Role-Based Training in a Distributed Learning Environment

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The Challenge

How to support the Symantec mission:

‘To protect and manage information, so everyone is free to focus on achieving their goals’

• For all audience types via a training experience that supported the need to delight customers and maximise training coverage.

• Accommodate diverse audience needs – now and in the future
The Approach

• Recognise the Training Industry is changing
  – Job roles are more task based
  – Content needs to be consumed in a more interactive and distributed manner

• Apply new modes of thought and application
We assessed how the training industry and roles are changing...

Mobile is everywhere, and learners expect access to training anytime, anywhere, on any device.

Social collaboration sites and tools are providing new opportunities for learning from peers and experts.

“Gamification” is gaining traction within the training community and influencing expectations about what training can be.

The “information now” generation wants to be able to access, not necessarily retain, information when they need it.

Job roles are more task based not requiring full feature, function skills or knowledge. It’s more fitness for purpose.

Text-heavy eLearning and lecture-heavy classroom instruction are not what learner’s want. Short, modular components, with access to experts when they need them are the new preferences.
We took a holistic view regarding the need to create a learning culture around the jobs and tasks people do.
We identified Functions, Roles, and Competencies that impacted all audiences

7 key **job functions** were identified:
1. Sales
2. Technical Sales
3. Design and Architecture
4. Implementation
5. Operations
6. Administration
7. Technical Support

18 **job roles** were identified:
1. Tech Support HUB / GSS
2. Tech Support Frontline
3. Tech Support Advanced
4. Tech Support Backline
5. Tech Support Manager
6. Designer/Architect
7. Implementation (Professional Services/Consultant)
8. System/Application Administrator
9. Operator
10. Internal Sales
11. Partner Sales
12. Strategist/Evangelist
13. SE Tech Account Manager
15. Specialist SE - Architect
16. Consulting Sales Manager
17. Consulting Project Manager
18. Consultant

130+ **competencies** were defined:
- Some competencies were applicable to nearly ALL roles, for example: *Understand the product in the context of the business purpose.*
- Some competencies were applicable to only a few roles, for example: *Apply advanced troubleshooting skills to solve uncommon issues and undocumented cases.*
If we were to overlay all roles in a single diagram, it would look something like this:

What it told us...

• There are a significant number of competencies that are applicable to multiple roles.
• There are some competencies that only apply to a few roles.
• By modularizing our training content to align with competencies, we can develop once to serve multiple roles.
• Overlaps indicate where training and assessment development efficiency can be maximized.
• Modularity at the competency level forms the foundation of a role-based curriculum framework.
Which enabled us to map 10 Competency Categories

- Advanced Support & Troubleshooting
- Soft Skills
- Basic Support & Troubleshooting
- Tools & Processes
- Technical Administration
- Symantec Technical Fundamentals
- Technical Solution Implementation
- Sales Fundamentals
- Technical Solution Design
- Technical Sales Fundamentals
- Basic Support & Troubleshooting

Click each category to view a detailed list of competencies.
From Competencies to Role-Based Training

Learning Path(s)

Competency assessment (quizzes, exams)

Competency

Learning Activity

A learning activity may be a video, a portion of an instructor led class, an exam, an assessment, etc.

Learning Activities cover one or more competencies.

Course

Learning Activity

Learning activities may exist on their own or be part of a formal Course.

Learning Activity

Symantec Technical Fund.

Competency

Competency

Competency

Competency

Tools & Process

Competency

Competency

Competency

Modular training can be served up in role-based learning paths/tracks.

Sales Specialist
Having mapped Roles and Tasks to competencies we assessed Traditional training methodologies

### Instructor-Led Training (ILT)

- Lectures from an expert
- Peer interaction
- 1-on-1 interaction with an expert
- Ability to ask questions
- Learning focus; fewer distractions
- Hands-on labs with expert support
- Reference material (student guides)

### Virtual Academy (VA)

- Lectures from an expert
- Ability to ask questions
- Hands-on labs with expert support
- Reference material (student guides)

### Web-Based Training (WBT)

- Available anytime, anywhere
- Ability to learn at your own pace
- Just-in-time accessibility
- Long-term accessibility
- Ability to pick and choose topics
- No travel cost/time
- Flexibility to schedule around job
- Reference material (content, simulations)

#### What learners and their managers like

- Lectures from an expert
- Peer interaction
- 1-on-1 interaction with an expert
- Ability to ask questions
- Learning focus; fewer distractions
- Hands-on labs with expert support
- Reference material (student guides)

#### What learners and their managers don’t like

- Event restricted to a time and place
- Limited time to access experts, peers, and labs
- Large time commitment/time away from job for a week
- Travel cost and time
- Information overload during the event

- Event restricted to a time and place
- Limited time to access experts/labs
- Large time commitment/time away from job for a week
- Information overload during the event
- Lack of direct peer and instructor interaction
- Difficulty staying attentive for 8-hours a day in virtual setting

- Learning in isolation; difficulty staying engaged
- No ability to ask questions
- No access to an expert
- No peer interaction
- No real hands-on labs (simulations only)
Distributed learning solution model

Digital course content
- Interactive eLearning modules
- Videos of experts
- Recorded product demonstrations
- Interactive product simulations
- Mobile-ready content

Social learning community
- Peer interaction
- Interaction with experts
- Knowledge-Sharing
- Online chat with peers
- Forums and message boards
- Professional networking

Structured learning program
- Scheduled instructor-led Webinars
- Scheduled group activities and Q&A
- Instructor-Student tutoring
- Reinforcement through online group activities
- Monitored remote online labs
- Self-serve remote online labs
- Remote lab sandbox
- Multi-Level accreditations/certifications
Distributed learning...

- Drives up engagement with the learner in order to:
  - Improve learning outcomes.
  - Increase learner satisfaction.
  - Increase demand for training.
  - Advance the real and perceived value of training.

- Enhances traditional training formats by distributing them across time (four weeks or more) and across multiple formats (digital content, instructor-led webcasts, access to hands-on remote labs) with multi-point social learning interaction and support (peer-to-peer, peer-to-instructor).

- Emphasizes advantages, and minimizes disadvantages, of traditional training methodologies.

- Is personalized to address different learning styles, pacing, skill levels, and formal or informal training needs (structured vs. ad hoc).

- Looks ahead to incorporate training trends (mobile access, gamification, social collaboration, modularity, just-in-time information now).
Distributed learning a pathway to competency
(Provides a sweet spot to address the holistic view of learning)

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Distributed learning program example
Example: Fully distributed learning

Instructor/Student Time Profile:
• Ideal duration would extend over longer period of time (for example, 8 weeks) but could be limited to 4.
• E-moderator and student time limited to 5-6 hours per week, spread over more weeks. Less lecture, but structured guidance and milestones by E-moderator.
• E-moderator sets class milestones for completion of sections of work and holds review and summarization sessions at that time (could be sync - webex, or async - forum).
• Lab access spread over more weeks; with a mix of scheduled remote lab time and on-demand lab time.

Benefits:
• Better learning retention due to spreading experience over longer period of time.
• More flexibility in student’s schedule, as fewer hours are required per week.

Drawback: this model requires more complex instructor and lab allocation tools and methods.

Legend:
I Instructor-led webinar
G Group activity
O Optional webinar

Access to Digital Course Content
Access to Social Learning Community
Scheduled Lab Time
On-Demand Lab Time

Week 1
Week 2
Week 3
Weeks 4-8

Week 1
Week 2
Week 3
Weeks 4-8

Week 1
Week 2
Week 3
Weeks 4-8

Week 1
Week 2
Week 3
Weeks 4-8

Week 1
Week 2
Week 3
Weeks 4-8

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POC Distributed Learning Design

LMS (Saba)

“Portal”
Static Web pages

Webinars & Soc. Interaction
Adobe Connect & Symconnect

Learner

• Registration via Portal
• Participants will include employees, partners, and customers.

“Portal”
Static Web pages

Learning Paths
Training Events

“Portal”
Static Web pages

Labs

Additional Content

CMS

• Live VA webcasts using Adobe Connect.
• Discussion & Group Activities / Forums via Sharepoint

• Modular labs
• Hands-on learning

• Whitepapers
• PDFs
• Manuals
• Tech Notes
• eLibrary modules

Articulate Storyline

Registration via Portal
Participants will include employees, partners, and customers.

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Articulate Storyline
Thank you!