Beyond E-Learning - an Interview with Marc Rosenberg (Dec 06)
- by Karl Kapp

Kapp: The title of your latest book is Beyond E-learning. Do you feel most organizations are ready to go beyond e-learning?

Rosenberg: It depends on the type of organization you're referring to. Are most organizations, as in business organizations, ready to go beyond e-learning? I think more and more of them are all the time. People at the front lines of business are becoming smarter about how they get performance problems solved in the most effective and least costly way. From the business perspective organizations are looking for a variety of performance solutions, not just training solutions.

On the other hand, if you are talking about training organizations, I think that depends. Many training organizations are beginning to embrace new forms of learning and performance improvement solutions that may not be training-related. But still too many training organizations are stuck in the training-only solution strategy. We do have different flavors of that solution; classroom, online, virtual, synchronous, asynchronous, but they are all variations of the same approach, and unfortunately, some training organizations still approach performance problems with a single solution, which is "We do training. So how can we fit a training solution to your problem?"

To summarize, I think businesses are generally moving towards more innovative learning and performance solutions. I think training organizations are realizing that there's more they can do, but there is a lot of work that still has to go on here.

Kapp: What do you feel is typically the catalyst for the training organization to "get it"?

Rosenberg: Well there are numerous catalysts. One is to find a problem in the organization that is clearly solvable by a more creative or a more innovative solution than just training. The old training solutions aren't getting the support they have gotten in the past. So by the very nature of the problems organizations are currently facing, new solutions will get more traction, especially in the front lines. This is also a result of an improving consultative relationship that training people are building with the business units.

So that is one catalyst. Another catalyst is the increasing use of outsourcing for traditional training. Organizations that are looking to maintain their value are looking for new missions and are beginning to embrace the learning/performance improvement model that encourages them to move in a new direction.

Third, the general field is moving in the direction of learning and performance improvement directly in the context of work. People are beginning to embrace this concept because it is increasingly making a lot of sense in that it more directly addresses specific business needs.

Kapp: In your book you explain that knowledge sharing is the hallmark of a smart enterprise. Can you explain what you mean by that statement?

Rosenberg: Well the best way I can explain it is through an example. We often think of training as a way to get knowledge out there to the entire workforce, but in many cases knowledge is only transferred to those who attend the training course. We run constant sessions to get everyone
through a training course so we can share critical information with them. True knowledge sharing is not necessarily a one way street; it is more collaborative. People in teams and across organizations do the knowledge sharing, and it flows through the organization like the ripples created when you toss a stone into a still pond.

The idea behind all of this is that a free flow of knowledge across organizational boundaries is essential if organizations are to work more modernly and efficiently. Simply calling everyone in and presenting the information to them in a classroom format is too much of a one way flow of information from either the instructor or computer program to the individual learner.

Even if you have 20, 40, or 60 people in a classroom you are still communicating one person to one person. The key question is, "How do you get those 20 or 40 or 100 people to start passing information and knowledge among each other?" That would be the real breakthrough. That is what makes a smart enterprise, or a more common term, a learning organization; an organization that allows information and knowledge to be shared. The whole idea of collaboration and knowledge sharing is so powerful; much more powerful than instruction or instructional design in terms of changing an organization.

**Kapp:** How good do you think organizations are at sharing knowledge?

**Rosenberg:** It all depends on the organization. Organizations that are very bureaucratic and hierarchical may not be as good at sharing knowledge as organizations that are flatter, or organizations that do more work with virtual teams, or organizations that reward knowledge sharing. A lot of organizations have a long way to go to improve their ability to knowledge share. Employees might look at knowledge sharing as somewhat risky because they are giving up information that they know to others and this might put them at a disadvantage when they are compared with their peers in the appraisal process.

On the other hand, if you can create incentives and an environment where knowledge sharing is encouraged, then the organization and the individuals can benefit. Just think about how much better off we would have been, if knowledge had been shared between the intelligence agencies before September 11th. So you can see that the most highly trained people on the planet in their field of expertise were missing an essential element - the ability and desire to share what they know - and that contributed to the catastrophe. Just being smart doesn't mean you are effective. What matters is working collaboratively and freely sharing knowledge with others.

**Kapp:** If you look at those security organizations filled with highly trained and smart people and they had a knowledge sharing failure, then what chance does an average organization have of changing its culture? Can cultural barriers be overcome?

**Rosenberg:** Sure you can. First you need to stop packing everyone into a classroom any time the organization needs to learn something. That doesn't encourage knowledge sharing.

The process of changing the culture starts with front line managers and how they are trained and how they are given incentives to encourage knowledge sharing in their organizations. I think it is a "grass roots" system; you have to improve the infrastructure and performance appraisal structure that provides incentives for people to share what they know.

The bigger an organization, the more bureaucratic it can be, and the more barriers that are created. Perhaps when organizations get to a certain size, they should be broken up so they can be leaner, more innovative and more collaborative. As organizations get bigger, their ability to collaborate is put at risk. But sometimes, large organizations can innovate fast enough and collaborate fast enough to support real-time learning and performance improvement. So it's not necessarily size, but culture that counts.
I think there are organizational design issues at play, and it depends on who you hire. Do you hire people who have a tendency to collaborate? Who do you promote? Do you promote people who are going to collaborate or do you promote people who simply have the best technical skills? How do you balance those two? It's not easy, but it's necessary.

**Kapp:** You mentioned in your book about blogs and those types of technologies, do you think they are going to help with the knowledge sharing?

**Rosenberg:** I don't think technology is going to necessarily help. You are not a collaborative organization just because you have blogs or wikis. I've seen too many organizations put out technology and say, "Now we are collaborative." That is ridiculous.

Being collaborative is human nature and if you are collaborative at lunch or at the water cooler you might be collaborative by using new technologies, but if you hoard knowledge, new technologies will not, in and of themselves, make you more collaborative. It can be a waste of money and time, and there is no justification in my mind for installing technology to create collaboration if no one wants to collaborate. But there is a powerful argument for using technologies to enable collaboration if the organization is ready.

In other words, if you have an organization that collaborates as part of its culture, and you have the right rewards and performance incentives to keep it going, then I think new technology will be useful. I think blogs, wikis and instant messenger and all these tools are extraordinary helpful if you have a culture that rewards and encourages collaboration.

**Kapp:** Yes, that makes sense. Technology alone will not make an organization that is not collaborative automatically become collaborative.

**Rosenberg:** Never. You might get people that are curious about the tools and play around with them, but those are probably the early adopters that will do it anyway and over time their interest will wane if they don't see benefits for themselves or the organizations. Too many organizations install chat rooms and discussion groups and suggest to their employees to go in there and collaborate. It almost never happens because people say, "What is the benefit for me of spending time in there versus spending my time doing something else?" Replacing chat rooms with blogs and wikis won't change the situation. However, blogs and wikis do offer a promise for organizations that are really dedicated to creating a collaborative culture.

**Kapp:** That leads me into the next question. Are there knowledge management traps or problems that organizations fall into and how can they be avoided?

**Rosenberg:** Before we discuss traps or problems, we need to be clear on the definition of knowledge management. I view knowledge management as a collection of three things. The first one is collaboration, sharing among people. The second is the ability to effectively find and use expertise-being able to find answers from people who know the answers quickly. The third is the use of information repositories, libraries of information that people can access easily and share conveniently.

Most people view knowledge management as only the third element, information repositories. People create huge virtual filing rooms full of documents and say they have knowledge management. This is a trap.

In my mind, that is just one piece of it; just because you have a shared drive where everything is housed doesn't mean you are getting any real value from it.
Another trap is thinking that knowledge management systems need to be big. Some of the best knowledge management practices are at the departmental or group level because, at that level, you can identify a real need or value and get something done in a reasonable time and at a reasonable cost.

Another trap is thinking that knowledge management is just another form of training. This thinking leads to thinking that instructional design expertise, and instructional designers are all that's needed to build knowledge management systems. Yes, there are some common skills between designing a course and designing a knowledge management system, but there are some dramatic differences as well. Knowledge management is a much broader concept. You need skills in information design and content organization that are not yet in the typical instructional designer's repertoire. You also have to be concerned with access, entitlements, search and other publication and utilization issues because you really are building an information library for the entire business and you have to define how that library is going to be run.

The final trap is thinking that if you put it out there people will use it. This comes back to the culture issue. You cannot create a technological solution without creating the incentives, rewards, culture, and values that will encourage employees to use it. The mere application of technology won't solve our problems.

Kapp: Right; that is getting the cart before the horse idea.

Rosenberg: Always.

Kapp: Not only do organizations have trouble sharing knowledge and falling into those traps you mentioned, they are also faced today with what some people call the brain drain phenomenon; people with years of experience leaving the organization. How do you suggest that organizations stop or capture that knowledge?

Rosenberg: The first question is, "Why are they leaving?" Are we talking about people that are just retiring or are we talking about people that spend 5 or 10 years in an organization and have done a wonderful job but have decided to leave for a better job someplace else? There are two different kinds of brain drains.

The first one is the long term expert who is retiring. You could have the expert sit down for six months and write down everything they know or be interviewed for days at a time to capture their knowledge. I don't think that works. If you have someone who is truly an outstanding person with lots of knowledge, the best way to transfer that knowledge is to apprentice some smart young people to that person for a year or so before they leave. Pull the younger workers out of their job for a year and tell them that they are going to work with an expert because they are going to be the next expert. Using the apprenticeship technique, there is a transfer of tacit knowledge from the senior to the junior level. There is value in keeping some knowledge tacit so you can spread it to more people. Better yet, instead of just having one person work with the retiring person have three or four individuals work with them so by the time that person retires you have quadrupled the amount of insight and expertise in the organization.

The other problem is identifying what content this person is walking out with. How many people are walking out the door with high value content that needs to be captured? You need to be careful you are focusing your efforts on unique content that, unless captured, could be lost to the business, and that the loss is of real consequence.

Organizations need to think ahead, after all, if someone who knows a lot of stuff is retiring and the retirement causes the organization to panic about losing that information, it's somewhat of an indictment of that organization. Why did the organization wait so long before starting to share
knowledge? It's almost as if the organization couldn't be bothered until panic set in. Years earlier, the organization should have placed that person into some type of role where they were sharing knowledge as part of their job assignment.

**Kapp:** And think of the productivity that has been lost by not sharing knowledge for all those non-retirement years.

**Rosenberg:** That's right, this is about identifying experts and giving them expert roles, and expert roles are about sharing. Imagine, if you will, a major scholar or researcher at a university who was about to retire and just before they retired, they walked into a colleague's office and placed dozens of unpublished research papers and scholarly writings on the desk. "Here is everything I know about my area of expertise" he or she might say. The researcher should have been sharing this knowledge all along, not just at retirement. The knowledge may have value but it will take months to sort it out. It would seem to me that long before retirement, the researcher should have been publishing these articles and/or mentoring colleagues. We talk about succession planning for executives and managers but not for experts. When this happens, we end up panicking when the person leaves.

**Kapp:** What about the other type of brain drain you mentioned?

The other kind of brain drain is when people are moving on to another company. If someone walks up to you after 10 years and says "I'm going to this other company and I am taking what I know with me," besides a few cursory legal things you might do, there is not much recourse. You can't have them check their brain or knowledge at the door when they leave. You need to determine why this person is leaving. The reason is probably the culture of the company, opportunities to do interesting things, or salary. Whatever the issue, you need to address it so that you can have a greater retention rate for your best people.

If there are people you want to keep inside the business, you need to keep them involved and engaged so you don't lose them. Organizations sit around and don't pay their employees enough or don't give them interesting things to do and then the employee quits. All of the sudden, the employer goes crazy thinking, "how are we going to replace this expertise?" In some respects I think it is more of a human resource issue than learning or training issue.

**Kapp:** In some ways do you think organizations have done this to themselves by being so lean and focusing only on the bottom line?

**Rosenberg:** No, I think companies should always focus on the bottom line, but in addition, they ought to work hard, and work continuously to identify their best and brightest people. I don't mean just their management prospects. You have some person sitting in a company that keeps coming up with idea after idea yet they may not be executive material. How are you going to preserve this person and reward this person? People get promoted in companies from technical experts to manager simply because it's the only way to move up the food chain and get more money. This can be very frustrating for people who are, or wish to become true technical or functional experts.

So you see a lot of technical experts moving up and being taken out of their technical role into management where they aren't happy and, in many cases, aren't good at managing. Maybe we should think about how we can create opportunities for technical experts to stay technical experts. What type of perks and rewards can we give them so they can continue to serve the business as an expert over a longer period of time? Again, I think it is culture, I think it is human resources, I think it is incentives, and I wonder whether some companies are even capable of identifying their true innovative employees and internal experts. People are crunched into the same categories using the same performance appraisal system. So person A who is extremely innovative and smart is rated the same as person
B who is not innovative but a good manager. Perhaps, it cries out for differentiating the rewards and incentives we give. Losing people at the prime of their career is a different knowledge preservation challenge than losing people of the end of their career. Yet both challenges are important.

**Kapp**: Yes, I believe that to be a good distinction. I think not a lot of people are making that distinction.

**Rosenberg**: To scramble around writing down everything a person knows and then codifying everything that person has done is a reaction to inefficient management of high value human resources.

**Kapp**: Do you think there are certain things organizations can do to manage the expertise they have? One thing you said was a technical ladder as well as a managerial ladder.

**Rosenberg**: Well not only that, if someone is a true expert, that is as important as being a good executive or manager. I used to work in an organization that had no permanent instructors. What we would do is go out and find the best experts and then we would rotate them into the training organization on a promotion. After two or three years we would send them back to their regular organization at a promoted level. Then they not only had the expertise but now they also had the ability to communicate that expertise.

Putting experts through a training assignment is a very good way for them to become more communicative. I suggest that true experts should also have the opportunity to serve as coaches or mentors for a while or working on innovative projects. There is something to be said about putting experts in a rotational role. Unfortunately, organizations often respond that they can't free up experts to rotate them because they are working on projects that are far too valuable. This can be short sighted.

Do I think experts should spend time writing down what they know or creating courses on what they know? Of course I do. But I also think they should spend equal time being a mentor, a facilitator, or a support person who is put into a position to support others, via phone, email or other vehicle. Any one of these roles, and many others, transfer knowledge across the organization.

I remember when call centers were first deployed; one of the very first was the GE answer center. What impressed me was the people they put in these call centers were not entry level people, they were management trainees. People who were going to be running the business, and it was GE's philosophy at that time that if you were smart enough to run the business you were smart enough to talk to customers and help them through their issues. If you contact a call center today, you have to ask for the second or third tier to get to an expert, and by that time your level of frustration is...well, who among us hasn't been there?

There should be more of a focus on the ability of employees to reach experts. I've seen companies use knowledge brokers whose job it is to find you an expert in a couple of minutes. The person who needs the information doesn't need to know the expert. They just need to know that the problem is routed to someone who can answer their question. Those questions can then be captured in technology and put in FAQs and, as the question gets asked over and over, the best response - from the expert - is published. Then the next person gets routed to the FAQ, bypassing the expert.

There are software tools that can identify experts based on their profiles and provides a list of experts based on who they are and what the question is. It then helps connect the person with
the expert. There are different ways to do this if we are willing to allow our experts to serve as resources to other people

**Kapp:** You make some good points about internal access to experts. Switching gears a little bit, the next question deals with integrating work and learning. In your book, you talk about this, but do you think it is possible to do it, and, if so, why aren't more organizations integrating work and learning?

**Rosenberg:** Definitely you can integrate work and learning. In fact, the best way to integrate work and learning is to have the learning professionals involved in the design of the work upstream, where the work is designed at the beginning of the process.

Learning professionals should not think, "when a new process is implemented, we will have courses to support it." Instead they should think, "how can we improve the usability and the functionality of this process before we even need to conduct training?"

Learning professionals should be thinking about better help systems, better interfaces, better and easier instructions. I sometimes think that 50% or more of all training is compensation for bad documentation, poor software design and bad processes. If we get involved in improving the documentation, user interface and processes from the beginning, we will be more productive and work will be easier. We won't have so much unnecessary training. But we will have improved performance at lower cost.

I think it's possible and extremely important for training organizations to get involved with projects and product development early on, and to provide more input into the solutions that are provided. The training organization needs to have a disposition to look at performance problems first and to not lead with courseware. We often say trainers want to sit at the executives' table; well that may be the wrong table. They really need to sit at the product development table, at the initial stages of the design process. When designing learning and performance support into the work process you make it easier and more efficient, and the line between learning and work begins to disappear. I think this is the number one challenge for training organizations. It is very important for them to get massively closer to the work, and the nature of work -- how it is developed and managed.

**Kapp:** That would seem to be an entire paradigm shift for most training organizations.

**Rosenberg:** A lot of people talk about performance improvement or human performance technology or performance analysis, and there is a lot of that going on, but yet we don't see innovative tools for improving performance as a result. We tend to conduct a performance analysis and too often, low and behold, we find "training" as the answer. We may have better training as a result, but that's often not enough.

What I am looking to see are alternatives that are more work-based, more integrated into the workflow. That's the required paradigm shift. We often think about performance analysis as a way to build better courses. This is fine, but performance analysis ought to tell us when courses are inappropriate or wasteful as well. We don't consider alternatives nearly enough.

So what is it going to take to create this shift? Training organizations that want to take a little bit of a risk need to do things differently. They need to push back on a stakeholder and say that perhaps a course isn't needed (or isn't needed alone). Instead a better interface or a better help system would be a better approach. However, that process doesn't work unless you are at the front end of the design process. The training department needs to be in at the forefront, teaching other groups how to think about knowledge management, performance support and other innovations. You can't improve a new work process the day before it's deployed. That's too late.
**Kapp:** I have seen software where it's not quite finished yet, but the training date is next Friday and hell-or-high water next Friday there will be training.

**Rosenberg:** Right, well you know even more importantly, I would ask what kind of learning and performance support did you build into the software when you first designed it? Lots of ERP and software solutions have terrible help systems. People spend hours and hours in training because software builders didn't think about these things until after the fact.

**Kapp:** Right, we need to be more involved with the software and workflow development processes, which reminds me of a statement you made in one section of the book where you urge learning professionals to be an architect and not a bricklayer. Can you explain that further?

**Rosenberg:** First of all, let me say that I think there is something about brick laying that can be truly artistic and important. You can't have a building stand without laying the bricks correctly. The building may not be aesthetically pleasing if you don't lay the bricks the right way. So quality brick masonry, if you will, is very important because it is the foundation of the building. You can say the same thing about training; quality training is a foundation for performance improvement.

But, an architect has a more holistic, integrated approach to how they see things. They not only worry about the bricks, they worry about the plumbing, the electricity, the windows, and the overall building design. Taking that sort of architectural approach to performance improvement would enable one to consider not only the training but also performance support, knowledge management and culture building, as well as the incentive system, and the leadership of the organization. All of these things can come together to improve performance.

If you are an architect of those things and you are a person who understands how those things come together, then you are going to have a bigger impact than just laying the bricks. You are still going to use high quality brick layers, but you are also going to use high quality electricians and plumbers. Sometimes you might find a building that you want to build where carpentry is more important than brick laying; then you make that decision. But if you are a brick layer you may see every building as being made out of brick, and that's the problem.

**Kapp:** So the learning and development professionals in this field are not taking a broad enough view of the organization or their role within it.

**Rosenberg:** Well yes, but I do think we've matured somewhat. We pretty much understand what training can and cannot do, even though we don't always follow the best, or our own advice.

What I am saying is that we have to take a broader view of the organization in terms of what we can offer the organization in addition to traditional training. I know training people who do an excellent job and have a very broad view of their organization. They know exactly where training is required or not required. But in the instances where training is not required they may say it's someone else's responsibility because their specialty is training. The architect on the other hand sees their role as an integrator, rather than a specialist.

Another analogy may be the orchestra conductor as opposed to the person who plays the flute or clarinet. They are all excellent, but it's the combined effort of those people that make it great. When trainers think like orchestra leaders they may be more likely to see how different approaches contribute to the success of the overall effort.

**Kapp:** So being able to use different methods to solve performance problems is key?
Rosenberg: To use different methods or to find people who have that expertise. I am not saying that everybody needs to be a performance expert or an incentive expert, but they do need to recognize where those resources may be used and then build a team of people who would know how to use those resources.

Kapp: That makes a lot of sense and seems like a big issue facing our field. Speaking of big issues, what do you think is the number one issue in the field of learning and development right now?

Rosenberg: It depends if you are focused on the technology or not. If you are focused on e-learning and technology then the issue is to not lead with the technology. To me I think we are too easily swayed by the latest and greatest technology. We think technology solves our problems when in fact; technology enables solutions but doesn't provide the solution. A Learning Management Systems (LMS) is not a strategy. It is a training enabler and the question still remains, "What are you going to do with your new LMS that brings value to the organization?"

For training people overall, I think the biggest challenge is how to get more integrated into the work, how to blur the line between working and learning so the two are more harmonious. How do we provide the right learning and performance resources to the right people at the right moment of need, and at exactly the right time?

Another issues is to know when training is or isn't appropriate. I often tell people that the best contribution trainers can make to the organization is helping them make the right decision about whether training is needed or not needed, and what might be a better solution. Building the product can sometimes be outsourced but making the decisions of what type of intervention is needed should be part of the business process.

Kapp: Ok, good, well, looks like we are almost out of time. So, the final question I have relates to my role as a professor here at Bloomsburg University. I teach graduate students in the field of Instructional Technology and would like to know what advice you would give them as they graduate from they program and go into the field?

Rosenberg: I think the most important issue for graduate students in the field of Instructional Technology is to understand that most of them will go to work for companies where training is not the core business. Instead, training is seen as simply an investment that a business makes to improve productivity and competitiveness. And if the investment isn't paying off, it is going to go away. So the graduate students need to go in there and understand that their role is to basically help their companies win in the marketplace, and that may require new thinking or compromise, and a change in perspective that they might have not have learned in graduate school. So that would be my charge-you're not in Kansas anymore.

Kapp: Good advice and insight, as we conclude, do you have anything else you would like to add or say?

Rosenberg: Yes, I think the field is at a major crossroads. Mainly because the technology has become so pervasive and so easy to use that we have become reliant on it. It's not that we should abandon technology by any means, but there are some fundamental truths about what we do that are not going to go away or be solved by better and easier technology.

Those truths are that bad culture trumps great training, technology can only enable performance, and training is expensive so we ought to look first for simpler solutions first. Integrating work and learning is becoming critical. You don't see massive new corporate universities being built these days. We need to be more nimble and more resource savvy. Technology makes things easier but it also creates new challenges. We can't simply assume that converting what we have always
done to a new technological distribution platform will be what's needed. I think we need to re-examine what we have done and ask ourselves if we should continue the same practices. In the past technology merely made things more efficient, but now I think we need to re-examine what we do because of the work and learning issue, the cost issue, the outsourcing issue, the knowledge explosion and volatility issues issue. All of these things are causing a major rethink of learning and performance which is interesting but could, if we're not careful, scare some of our constituents, stakeholders and clients away.

Kapp: That reminds me about what you said in the book about the fact that LMS's are now so expensive and reach across the entire enterprise that they are held more accountable for the costs they are incurring. With the advent of LMS's, training is no longer a simple investment of a few thousand dollars, often it is an investment of a few million dollars.

Rosenberg: And not only that, what the training department does is look at the data provided by these million dollar investments and then reports those numbers as if those numbers are the kind of data that the rest of the organization really needs. Just because the LMS can tell you how many minutes an employee typically spends on a page of an e-learning program doesn't mean that data is worth anything. It may be valuable to trainers as they strive to improve a particular program, but do front-line executives care? We need to better understand what information from us they do care about.

Kapp: Yes and in the book you mentioned that learning professionals need to use metrics that have meaning outside the training department. Most of the time we aren't.

Rosenberg: Yes that is true, and that is something that we need to get better at. Training professionals always ask me how to determine whether they are successful or not. I say you are not the ones that are supposed to determine if you are successful or not. Your client is. Have you ever asked your client what constitutes as success? The client may never ask about whether the learner passes a test or not. Instead they may say that the managers feel that their people are more energized and that might be enough. You don't know until you ask.

So while I am a big supporter of learning technology, I want people to understand that technology will only enable you to achieve your goal; they shouldn't become the goal.

Kapp: Well, put, thank you. I enjoyed our discussion.

Rosenberg: Thank you.

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