

## Surround Learners With Meaningful Assets Tool

**Objective of This Tool:** Take the modern way to closing skill gaps by providing 5-10 Learning Assets across all three Learning Touchpoints (Social, Formal, and Immediate) in a deliberate, thoughtful way that assures that learning is available at the key moments of learning need for each learner persona.

**Instructions:** Follow the four (4) step process below, culminating in a Venn Diagram (see template) of the learning assets that make up your new learning cluster, with a list of learning objectives for each asset. These will be used for the detailed design and development of each learning asset.

### 1. Gather Inputs from Other Actions (Change, Learn and Upgrade)

**Name of Learning Cluster:** \_\_\_\_\_  
(name often describes performance improvement goal)

**Strategic Performance Objective (SPO) (from the Change Action):**

By improving \_\_\_\_\_ (skill) for \_\_\_\_\_ (learner group),  
the business will benefit by \_\_\_\_\_ (KPIs).

The changes to on-the-job behavior that we will see among team members include  
\_\_\_\_\_ (visible behaviors on the job).

### 2. Learning Cluster Development (Brainstorm, Converge, Map, Check)

**BRAINSTORM.** Consider each learner persona, one by one, and brainstorm learning assets that have potential for meeting the unique needs of each persona—when, where, and how they work and learn. No single asset will cover all terminal and enabling learning objectives, but, the entire column of assets will address the learning objectives needed by this persona.

- Start the brainstorm session with items in the Learning Assets Matched chart above, further describing each asset to communicate the idea within the cells.
- Brainstorm more ideas to add to the Learning Assets Matched chart.
- Work down each column. Some assets may appear in more than one column. If an asset appears in all the persona columns, move it to the “All” column.

**Tip:** Learning assets are often named based on  
- media (video, chatbot, class, wiki, e-learning), OR  
- terminal objectives (ex: SOP Knowledge, Demonstrate Good Practices, Troubleshooting)

### Learning Assets Matched to Learner Personas

Based on your Learn and Upgrade Actions, list types of learning assets that are likely to meet the learning needs of your chosen learner personas. Add rows as needed.

[persona name here]	[persona name here]	[persona name here]	All personas

**CONVERGE.** Looking at the entire set of possible learning assets listed in the chart, select those you want to include in this learning cluster. Consider both the learning needs of each persona and what is realistic for your situation. This may take several rounds of trial and error to find the right mix.

**MAP ASSETS TO LEARNING TOUCHPOINTS.** Each persona should have an asset in each learning touchpoint (Social, Formal, Immediate). Here is a suggested process for mapping.

- Write the short name of each asset on a color-coded box (digital cell or sticky note).
- Move colored boxes to a suitable location on the Learning Cluster Visual (next page)
- Assets that work for all personas are in black and white (delete duplicates).
- Missing something? Identify additional assets to meet the learner persona need.

**Tip:** Resulting image should be a mix of color and B&W, rarely all B&W.

**Check and Recheck**

- Do you have a learning asset for each learning touchpoint for each persona?
- Are there any needs uncovered from your learner personas that are not being met?
- Do the assets further the strategic performance objective for your learning cluster?

**4. Assign Terminal And Enabling Objectives To Each Learning Asset.**

Return to the hierarchical relationship of objectives as shown in the Change Action Tool. Create a list of the terminal objectives and enabling objectives needed to achieve the SPO, at the level of detail required for this project. You can use the templates below for crafting strong objectives, or use your normal learning objectives creation and mapping methods.

**Template for Terminal and Enabling Objectives:**

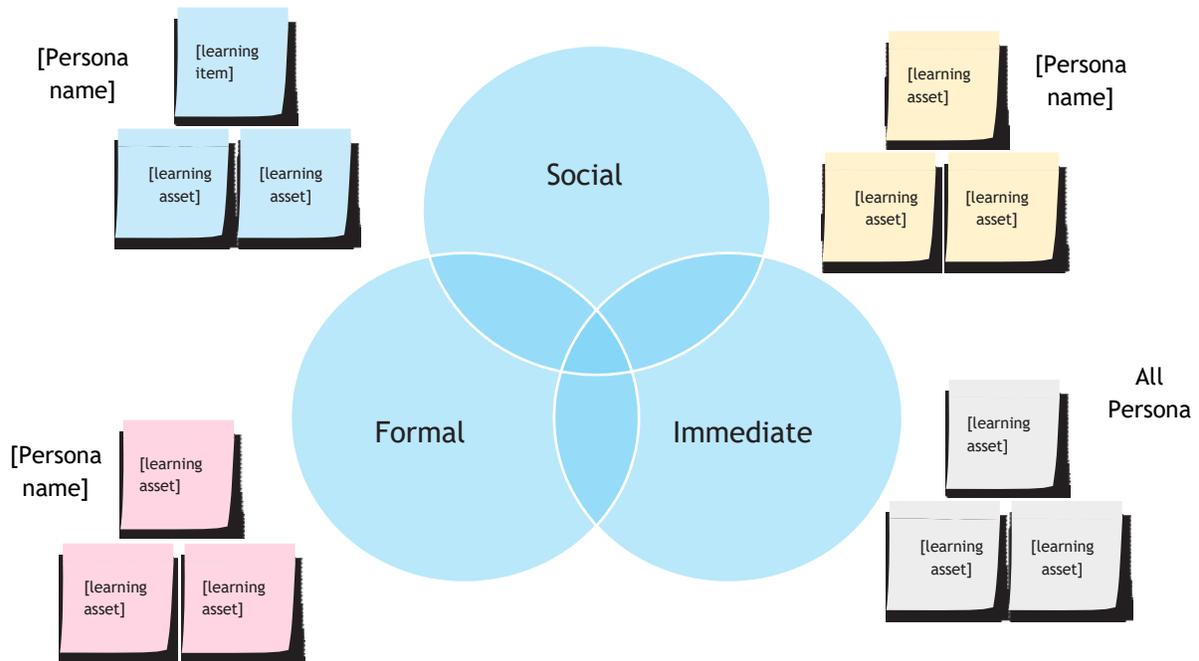
This learning asset helps           [Audience/"who"]           to           [Behavior/visible skill]          ,  
 given           [conditions, situation, job aid, or tools]           and do it           [Degree, quality of visible performance]          

Next, indicate which learning assets will cover each objective. Ensure that learners will be exposed to learning assets for each objective relevant to that persona, and provide choices to help them reach these learning objectives when, where, and how they need to learn.

## Surround Learners With Meaningful Assets Tool (continued)

### Learning Cluster Visual (For Mapping in Step 2)

This visualization of the overlapping learning touchpoints - Social, Formal and Immediate - can be replicated physically (using chart pads and various colors of sticky notes) or online (using such tools as the Sticky Notes App, or PowerPoint). Whatever your approach, be sure the color-coded boxes are moveable. This very visual format makes it easy to assure that each persona has a learning asset at each learning touchpoint. Use the chart below to provide a more detailed description of the learning assets.



Learning Assets	Description

# Surround Learners With Meaningful Assets Example

## Time Management Learning Cluster

By improving *time management skills* for *team members* on projects, the business will benefit from increased customer satisfaction, achieved by *delivering most projects on time, and providing ample warning to management for projects that are off track on schedule*. The changes to on-the-job behavior that we will see among team members include:

- more discussion on what is needed to accomplish tasks in a required timeframe
- increased use of the language related to the time management skills model
- increased user activity on the time management app (TM-App)
- individuals checking their TM-App before committing to due dates
- more frequent conversations about potential risks to project schedules
- more discussions on project barriers that leadership can help overcome.

Lax Sam	White
Newbie Nasir	Light gray
Multi-tasker Marta	Dark gray
All Personas	Black

Time Management Learning Assets	Description/Comments
Virtual classroom	20 sessions for core TM concepts, over six weeks, by cohort
Self-assessment	Randomized question set, one for core TM concept
TM wiki	Using existing shared-file program, post navigable/indexed one-page info sheets organized by core concepts and tiered enabling objectives. Titles are searchable. Learners can add content, "likes," and comments to help learners and L&D identify best content.

