

## Learn Learner-to-Learner Differences Tool

**Objective of This Tool:** Dig deep into understanding the learning-need differences among your target learner group—differences that can influence your choice of learning assets as well as inform your instructional design. This tool guides you as you capture and verbalize these differences. The end result is a set of learner persona stories that characterize 3-5 unique segments of your learner population relative to the SPO (strategic performance objective).

**Instructions:** Follow the five (5) step process below.

### 1. Summarize What You Already Know

Jot down what you already know about this group of learners using the Learner Information List. Customize the list to meet the needs of this project.

Start with basic demographic differences among the larger learner group. Add pertinent differences that you glean from previous experience or from early discussions with stakeholders or others who asked for this learning cluster. Importantly, note your early suspicions about which subsets within your target learner group have a greater impact on the desired KPI described in the SPO. Ask yourself:

- Who has the biggest performance gap (“problem approach”)?
- Whose growth would significantly influence the whole (“strengths” approach)?

**Tip:** Be bold. These data are for your eyes only. If you know who the problem child is, name it! Surfacing obvious realities and barriers is a good way to ensure it’s addressed effectively.

### 2. Dig Deeper Into Learner Differences through Data Collection

Identify Additional Information Needs. As in step 1, use the following list to gather crucial information. To uncover important learner-to-learner differences, seek out data that will:

- Reveal learner-to-learner differences that affect what, where, when, and how these learners need to learn.
- Expose differences in skills, attitudes, and knowledge.
- Underscore differences in current performance and differential impact on the SPO.
- Confirm or refute your “Already Know” information gathered for step 1.

How will you get your data? Some common methods used to collect both qualitative and quantitative data include interviews, surveys, observation on the job, self-assessments, tests, and analysis of existing work or data. Sometimes data collection will be a budget item. Other times this information already exists within the company, just waiting for your analysis.

**Tip:** Keep in mind that you’re searching for key differences among subsets of the larger learner group. Key means relevant to this project, SPO, and skill gap, or desired on-the-job behavior and performance. Don’t try collecting every scrap of data. That’d be overwhelming!

## Learner Information List to Support Discovering Differences (customizable list)

|   |
|---|
| <b>Key Demographic Differences</b>  |
| <ul style="list-style-type: none"><li>List only demographic differences that are pertinent to this SPO, the skill gap, the KPIs, and desired on-the-job behavior.</li><li>Common demographic difference to consider: role, function, level, tenure, age, gender, division, country</li></ul>  |
| <b>Key Learning Need Differences (in General)</b>   |
| <ul style="list-style-type: none"><li>Typical response to training or learning (craves it, avoids it, is nervous about it, etc.)</li><li>Primary technology used on the job (as a go-to for learning assets or performance support)</li><li>Preferred learning go-tos (example, class, e-learning, video, self-assessments)</li><li>Level of self-awareness</li></ul>   |
| <b>Key Life-at-Work Differences (in General)</b>  |
| <ul style="list-style-type: none"><li>Work hours</li><li>Job environment</li><li>Level of discretionary time</li><li>Best time for learning (away from desk, during meetings, at home)</li><li>Barriers to learning</li><li>Network for learning (whom do they go to for answers?)</li></ul>  |
| <b>Key Performance Gap Differences (Specific to Project)</b>  |
| <ul style="list-style-type: none"><li>Current skill or performance level</li><li>Attitude toward this skill set</li><li>Barriers to behavior change</li><li>Awareness of this skill set, or the need for it on the job</li><li>Self-assessment of capability for this skill set</li><li>Estimated impact on KPIs</li><li>Who has the biggest performance gap (“problem approach”)?</li><li>Whose growth would significantly influence the whole (“strengths” approach)?</li></ul> |
| <b>Likely Moments of Learning Need: (Specific to Project)</b>   |
| Which moments are learners likely to face; where and when will they face these moments?   |
| <ul style="list-style-type: none"><li>Learning for the first time (new)</li><li>Learning more</li><li>Applying what was learned</li><li>When things go wrong</li><li>When things change</li></ul>   |
| <b>Ideas About the Types of Learning Assets That Might Appeal or Be Needed</b>  |
| <ul style="list-style-type: none"><li>Preferred training modalities (newsletter reminders, guided search, class, e-learning, self-study, just-in-time resources, mentoring, coaching, learn by trying, self assessment for improvement, etc.), being sure to understand what drives these preferences and openness to other options</li><li>Preferred level of technology used within the learning asset (none, some, the latest)</li></ul>                                       |

### 3. Analyze to Create Learner Persona Profiles

Do the analysis soon after information collection. Letting time lapse muddies impressions, and you miss out on important aha moments. During the analysis, be data-driven, avoid early judgments, and minimize bias and personal preferences. It's helpful to form a hypothesis, then use the data to prove or disprove the idea.

As you complete the information analysis, pull from it three to five personas, and create Learner Persona Profiles for each. The following table template is a good way to start. Fill in the left column with what you chose to gather, but only if it's pertinent to painting a picture of differences between the personas. A few rows are filled in for you and are highly recommended for every project.

For more, read "The Art of Knowledge Analysis for Creating Learner Personas".

**Tip:** You do not have to include polar opposites for each persona, just the ones that strongly influence the SPO. For example, if "newly promoted" is a group, your other personas should be deeper than "promoted long ago."

#### The Art of Knowledge Analysis for Creating Learning Personas

Now that you've captured all the data, it's time to analyze them. Karen Bishea, a persona expert, says, "This is done best as a team exercise. You can do it electronically, but in my experience, using poster-sized templates posted all around the room helps to capture the big key learning in a visual format that promotes discovery."

- Study the information.
- Lay the foundation—create knowledge grids from demographics, interviews, and survey knowledge.
- Create persona outline drafts through information assessment, evaluation, and plotting of knowledge. Seek three to five different personas.
- Start to visualize each persona. It helps to organize and prioritize items from the outline draft. Have faith—this is the hard part.
- Start to paint the picture of each persona with words. This process creates additional insights, connections, and relationships.
- Step back, view holistically, and adjust as needed. Each persona should describe not an individual, but a composite of individuals.
- Finalize your three to five persona profiles, adding or refining words to elicit a mental image.
- Not coming together? Here are some approaches.
- Take a break, then try again. Artists need subconscious processing time.
- In some cases, scrap it and restart with a fresh piece of paper, remembering to use your information to drive your conclusions.
- Test your drafts with someone outside the group to gain insights.

**Learner Persona Profiles Template** (Customize first column; fill in with information about your personas)

| Persona Name                              | 1. | 2. | 3. |
|---|----|----|----|
| Short Summary Description                 |    |    |    |
| Likely Impact on SPO (high, medium, low)  |    |    |    |
| <b>1. Key Demographic Differences</b>     |    |    |    |
|   |    |    |    |
|   |    |    |    |
| <b>2. Key Learning-Need Differences</b>   |    |    |    |
| Typical response to training and learning |    |    |    |
| Primary technology used on the job        |    |    |    |
| Preferred Learning Go-tos                 |    |    |    |
| Attitude at Work                          |    |    |    |
|   |    |    |    |
|   |    |    |    |
| <b>3. Key Life-at-Work Differences</b>    |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |
| <b>4. Key Performance Gap Differences</b> |    |    |    |
| Current skill or performance level        |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |
| <b>5. Moments of Learning Need</b>        |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |
|   |    |    |    |

#### 4. Create the Learner Persona Stories

(template on next page)

Write a creative explanatory story for each persona. To bring the story to life, be sure to name your persona and give it a face - literally - using an avatar or other facial image. Advice: Just start, then fine-tune. Test the personas with others, asking such things as:

- Do the characteristics feel true?
- When read as a group, are key differences obvious?
- Is the connection between each persona and the SPO and skill gaps clear and distinctive?

These stories serve as a foundation for selecting learning assets for the learning cluster to meet the learning and performance needs of each persona. You can use these to justify your selection of learning assets as part of the learning cluster.

#### 5. Use Personas to Guide Learning Asset Selection and Design

(template on next page)

Thinking about one persona at a time, jot down what learning assets would help to build skill, reduce frustration, and be present for in their moment of learning need. Refer to the persona's story and profile regularly throughout this process. The following chart is one way to brainstorm and capture it. During the Surround Action, learning assets will be chosen, and this chart will be a great guide!

Persona Stories and Suggested Learning Assets (Step 4 and 5 template)

|  |   |
|--|---|
| <p><b>Persona name]</b><br/>[persona summarized story]</p>    | <p><b>Persona name]</b><br/>[persona summarized story]</p>    |
| <p>Learning Assets that could <u>meet this personas' learning needs</u></p>  | <p>Learning Assets that could <u>meet this personas' learning needs</u></p>   |
| <p><b>Persona name]</b><br/>[persona summarized story]</p>  | <p><b>Persona name]</b><br/>[persona summarized story]</p>  |
| <p>Learning Assets that could <u>meet this personas' learning needs</u></p>  | <p>Learning Assets that could <u>meet this personas' learning needs</u></p>   |

Example: Time Management Learning Cluster

|   |  |
|---|--|
| <p><b>Multitasked Marta</b> is a more senior level employee handling multiple projects at a time. Her biggest TM challenges are 1) getting timely inputs from “core” team members and 2) being required to spend unplanned volumes of time on higher-priority issues for other projects. She needs to involve her project managers and boss more quickly to address above issues earlier than she does now. For this topic, she would like to learn on the go.</p>  | <p><b>Lax Sam</b> is an individual contributor with a few years of experience. He is a full-time “core” team member tasked with immersive, execution-type tasks for one or two projects at a time. His biggest challenges to time management are that he uses his time inefficiently because he doesn’t use systems like the TM-App to help manage his time or estimate the scope and duration of tasks. For this topic, he would like to learn alongside other people and have reminders in the moment.</p> |
| <p><u>Learning Assets that could meet this personas’ learning needs</u></p> <ul style="list-style-type: none"> <li>• E-learning</li> <li>• Time management page of links</li> <li>• Test-out opportunities</li> <li>• Coaching from project leader</li> </ul>   | <p><u>Learning Assets that could meet this personas’ learning needs</u></p> <ul style="list-style-type: none"> <li>• Classes</li> <li>• Lunch &amp; learns</li> <li>• “Learning moments” as push notifications from the app</li> </ul>   |
| <p><b>Newbie Nasir</b> is a recent college graduate who is trying to prove himself and so wants to learn how to do time management right from the beginning. His primary job is learning, but his biggest challenges for time management are that he has no previous experience or context for what commitments require in the real world, and he doesn’t know where the right people or resources are to include when needed. For this topic, he would like to learn deep, fast, and in social environments, so that he can then get to application quickly.</p> |  |
| <p><u>Learning Assets that could meet this personas’ learning needs</u></p> <ul style="list-style-type: none"> <li>• Case study blogs “When things go wrong vs. right”</li> <li>• Classes</li> <li>• Time management page of links</li> <li>• Peer or mentor coaching</li> </ul>  |  |