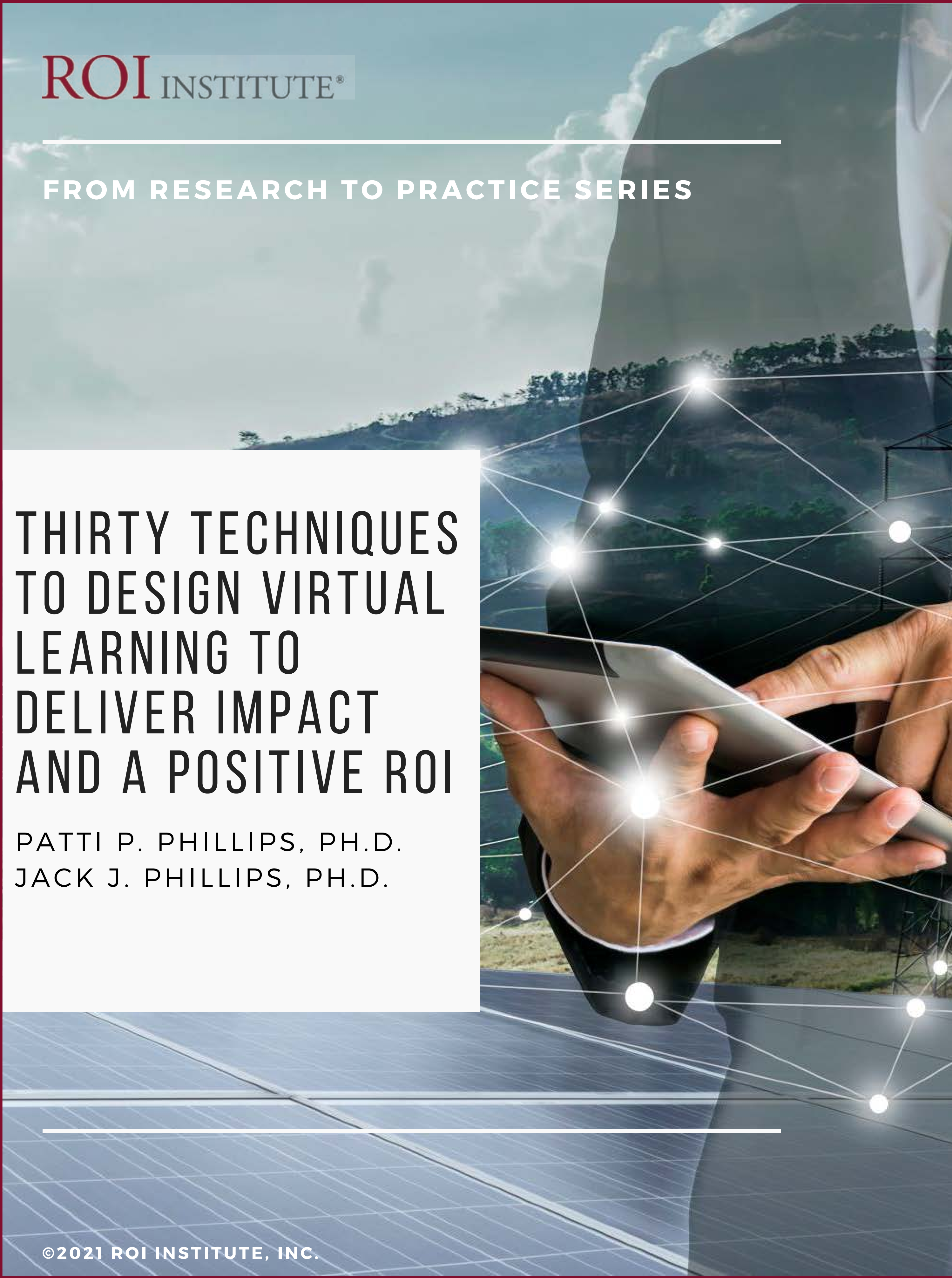

ROI INSTITUTE®

FROM RESEARCH TO PRACTICE SERIES

THIRTY TECHNIQUES TO DESIGN VIRTUAL LEARNING TO DELIVER IMPACT AND A POSITIVE ROI

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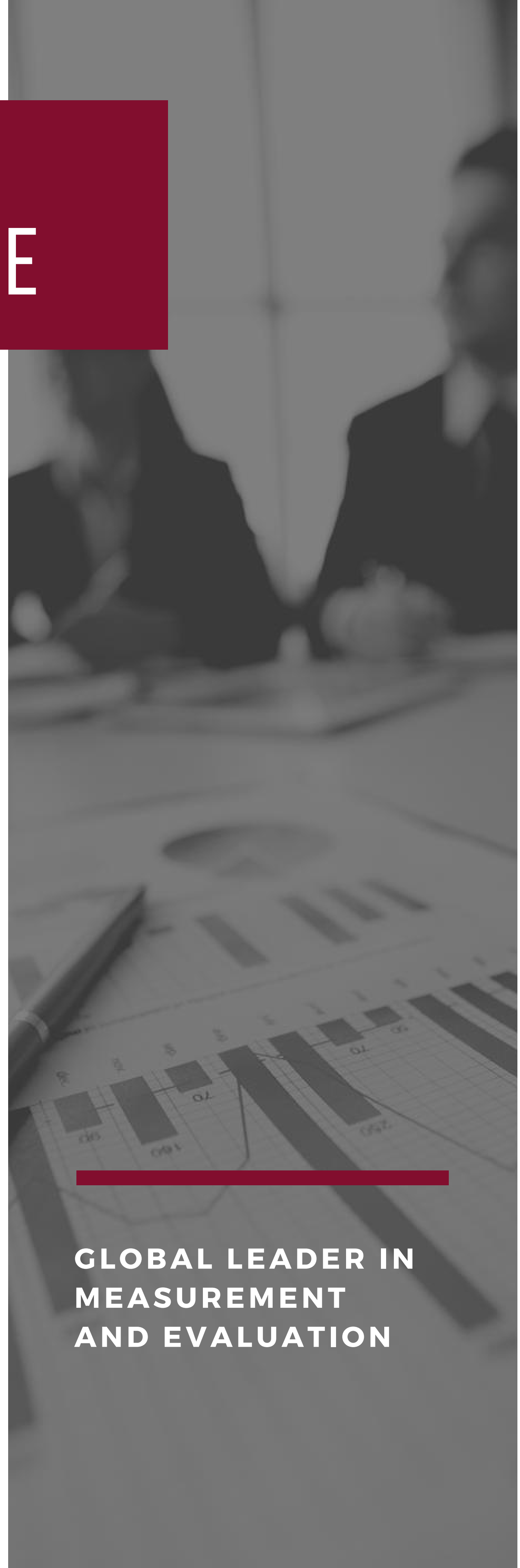

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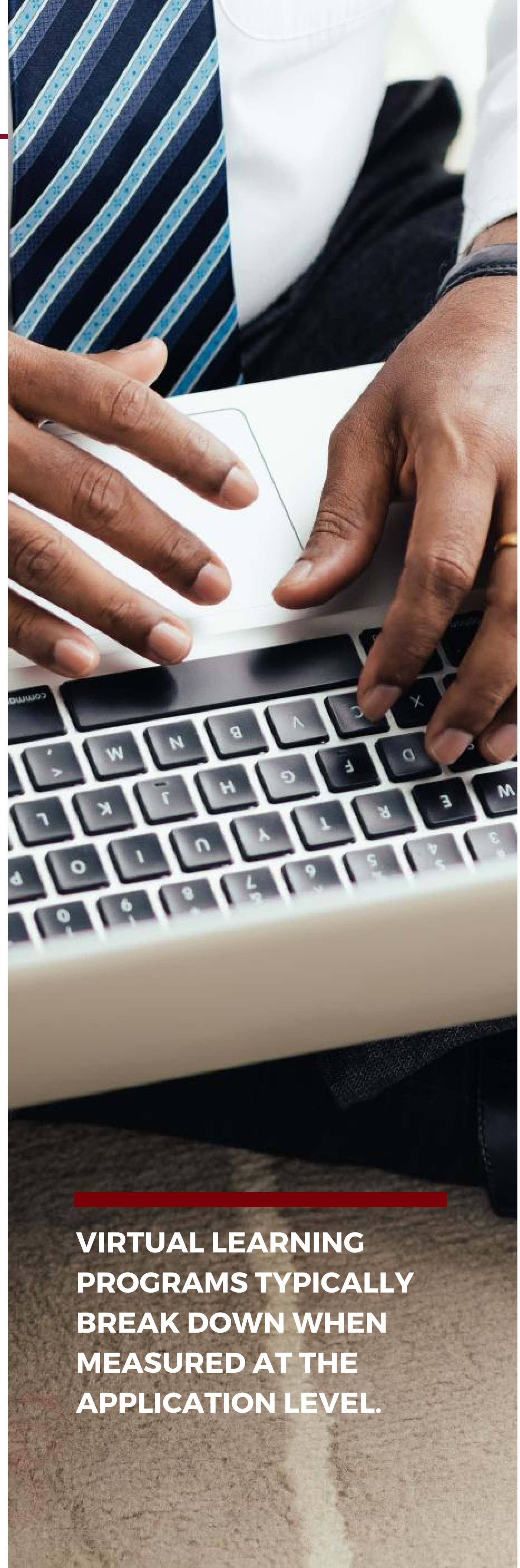
THE NEED

In today's uncertain economic climate, the need to ensure that virtual learning provides value and improves organizational outcomes is increasingly important. Because of the COVID-19 pandemic and the increase in work-from-home arrangements, most learning programs have shifted to virtual formats. This environment has created the need for program owners to design and implement virtual learning with the desired outcomes in mind. Additionally, there is an increasing economic need to demonstrate that the virtual programs are working and delivering the desired results.

Studies show that many virtual learning programs breakdown when measured at the application level (participants not using what they learn) and impact level (the business impact connected to application). Fortunately, L&D professionals can avoid this breakdown. To secure the support and funding that virtual learning needs, the programs must deliver business results. This report will explore how designers, developers, providers, and program owners can design virtual learning to deliver outcomes at the application, impact, and ROI levels.

THE CHAIN OF VALUE IS ALWAYS THERE

It is important to understand how success is achieved with virtual learning. How do you deliver more productivity, improve quality, have more innovation, or be more responsive to customers? If a lack of knowledge or skills is a stumbling block to success, then putting those processes in place will enable success. Virtual learning can easily provide this if the learning is connected to the business measure in the beginning, the right solution is implemented, and it's designed to deliver the impact results. More importantly, the amount of improvement in the impact measures caused by the virtual program can always be pinpointed. The success follows a chain of value, outlined in Figure 1.



VIRTUAL LEARNING PROGRAMS TYPICALLY BREAK DOWN WHEN MEASURED AT THE APPLICATION LEVEL.

Level	Measurement Focus	Typical Measures
0–Input	• Input into programs, including indicators representing scope, volumes, times, costs, and efficiencies	• Types of programs • Number of programs • Number of people involved • Hours of involvement • Costs
1–Reaction and Planned Action	• Reaction to the programs, including participants' perceived value and planned action to make them successful	• Relevance • Importance • Usefulness • Appropriateness • Intent to use • Motivational • Recommended to others
2–Learning	• Knowledge and success gained, learning how to develop concepts and how to use skills and competencies to drive program success	• Skills • Learning • Knowledge • Capacity • Competencies • Confidences • Contacts
3–Application and Implementation	• Application and use of knowledge, skills, and competencies, including progress made and implementation success	• Behaviors • Extent of use • Task completion • Frequency of use • Actions completed • Success with use • Barriers to use • Enablers to use • Engagement
4–Impact	• The impact of the programs and processes expressed as business impact measures	• Productivity • Revenue • Quality • Innovation • Graduation rates • Crime rates • Jobs created • Efficiency • Incidents of disease • Retention • Customer satisfaction
5–ROI	• Comparison of monetary benefits from project to cost of project	• Benefit-Cost Ratio (BCR) • ROI (%) • Payback period

Figure 1. The Value Chain for Virtual Programs

THE CHALLENGE

ROI Institute has had the opportunity to evaluate virtual learning for many years and have compared instructor-led learning with eLearning, often in parallel, to see the differences. What has been found is that virtual learning typically breaks down at Level 3 (Application) and Level 4 (Impact).

Why does this happen? There are five key reasons:

1. Multitasking inhibits learning. The research shows that multitasking reduces a participant's ability to learn (Devora, 2015). There is a myth that a person can multitask and still absorb in-depth knowledge and information. That doesn't happen. With instructor-led learning, multitasking is better controlled in many ways. This is accomplished not only by good design, activities, and engagement but also by the facilitator managing the learning environment and removing the opportunity to multitask. As we all have witnessed multiple times with virtual learning in virtual conferences, meetings, and online sessions, multitasking runs rampant. The reality is if learning is diminished, then application will be diminished, and impact will be diminished. This will decrease the ROI significantly.

2. Manager's support is usually missing. Participants typically leave their work areas to attend instructor-led learning programs. Their managers know they are involved, and the manager is likely to be involved in the decision for them to participate in the session. The manager creates expectations for the program. The participant will be away from the job, and the organization will miss that person's work. With this scenario, it is in the managers' best interest for the learning to translate into something useful and worthwhile for the department. Because of this, the managers are often involved before the program with setting goals and then after the program with following-up. For virtual learning, the manager is usually not involved. For the most part, the manager may not even know that participants are involved. This is because most virtual learning usually occurs during regular work hours in the participant's everyday environment, and the manager may often not even be aware of it. Without the manager's presence, the most significant influencer for transferring learning to the job is removed.

3. Virtual programs are designed for learning, not application and impact. Instructional systems designers design virtual programs to deliver learning. Designers think their work is complete when the participant has learned knowledge or skills. However, the executives who provide the program's budget want to see the business connection from participants actually using the learning. It is rare to find a virtual program designed for impact. Very few virtual learning programs have impact objectives. Without impact objectives, some key stakeholders may not fully understand why the program is being implemented. When impact objectives are in place, the team can design the program for application and the desired business impact. Designing for impact is more likely to occur in an instructor-led program.

4. The role of the facilitator is usually missing. There may be a live or recorded facilitator, a program administrator, host, or coordinator, but what is truly missing in virtual learning programs is the power and influence of a dynamic facilitator. Facilitators usually inspire the participants, encourage them, and support them to use what they have learned. Sometimes, a group of participants will bond together to deliver the required results. Virtual learning program designers must design for the delivery of learning and its application, and they must also create a replacement for the influence of the in-person facilitator.

5. Technology failures. Technology failures and connection problems appear in the best of organizations and in the best programs, as we all have experienced. Add to this problem the proliferation of inexperienced users that create havoc with some programs. The challenge to instructional designers is to make it seamless, as easy as possible, and anticipate and manage failures that occur far too often. In worst-case scenarios, some programs have had to be canceled entirely, postponed, or delayed because of technology issues. For an in-person program, this type of failure rarely occurs or can easily be adjusted. The good news is that instructional designers are working on this.

DESIGNING VIRTUAL LEARNING FOR IMPACT AND ROI

In our work at ROI Institute, we have been involved in thousands of ROI studies, many of them in the learning and development space. In the last two decades, we have been involved in the evaluation of many virtual learning programs. Whether it is blended learning, online learning, eLearning, simulations, or mobile learning, we have had the opportunity to see what works well and what does not.

IF APPLICATION DOES NOT OCCUR, THE VIRTUAL PROGRAM IS A WASTE.

In every one of our evaluations, we collect data on barriers and enablers. The barriers are the things that get in the way of the participant having success with the program. The enablers are the factors in play that help to achieve the success of the program. As you can imagine, these enablers present tremendous opportunities to see what can be done to enhance application and impact. The barriers tell us what we need to remove or minimize to have success and create an opportunity to design for success in the future. The enablers provide us with proven techniques that have already actually worked and proof that they made a difference in application and impact. We detail this in our book, *Measuring the Success of Learning Through Technology (Ekeles, Phillips, Phillips, 2014).*

Remember, from an organizational perspective, if application does not occur, the virtual program is a waste. Some people refer to this as scrap learning (learning that is not used) although the sponsors, supporters, and funders want it to be used and to have an impact. Figure 2 presents 30 techniques that can enhance the application and impact of virtual learning programs.

ACTIONS BEFORE THE PROGRAM

1. Develop application objectives for participants.
2. Have participants develop customized impact objectives.
3. Use performance contracts, a contract for application and impact between facilitator, participant, and manager.
4. Create an application guide to enable and support application.
5. Create a job aid to use in application.
6. Have significant other (manager) create expectations before the program.
7. Make it easy to provide application and impact data.
8. Require application and impact data as a basis for participation.

ACTIONS DURING THE PROGRAM

9. Use action plans to detail application steps.
10. Have action plans presented to the group to increase commitment.
11. Teach to application and impact.
12. Review Level 3 and Level 4 follow-up questionnaire in the last learning module.

TECHNOLOGY-ENABLED ACTIONS

13. Create coaching videos to use at appropriate times.
14. Use apps to encourage and enable the use of content.
15. Use guided support software to enable application.
16. Use selfies with the customer after the sale.
17. Use Riff Analytics to record quality and dominance of conversations.
18. Use social media groups to network for encouragement, support, and enablement.
19. Post recorded content reviews.

20 Use automated reminders for application and impact.

ACTIONS AFTER THE PROGRAM

21. Organize a group coaching session after the program.
22. Apply nudging techniques from “Inside the Nudge Unit”.
23. Collect action plans in a follow-up period.
24. Organize follow-up sessions to share results.
25. Use an on-the-job trainer to support application.
26. Provide encouragement from the manager (significant other) after the program.
27. Host a lessons-learned meeting after participants have used the content.
28. Share successes with other participants.
29. Hold a contest based on achieving success for application and impact.
30. Use a peer feedback process for on-the-job performance.

Figure 2. Techniques to Design Virtual Learning to Deliver Application and Impact

ACTIONS BEFORE THE PROGRAM

1. Develop application objectives for participants. Instructional designers are great at developing learning objectives. However, most programs need application objectives, defining how the knowledge and skills (content from the program) will be used. This creates a profile of success when the participants have properly used what they learned. It is important to develop these objectives in very specific terms so that it will be easy to recognize when the objectives have been met. Application objectives remind the participant of what they are expected to do when they leave the program.

2. Have participants develop customized impact objectives. Moving down the value chain, it is helpful to set impact objectives, the business measures. All application should have a consequence, and that should be an impact. This gives a chance to connect the program to the business in the beginning, which is the first step in the ROI Methodology (Start with Why: Align Program with the Business). Application without impact is, essentially, someone being busy.

Customized impact objectives involve two possible actions. If a program has an impact objective set for it, such as to obtain new clients, the objective may already be set for the participant. There may need to be some customization to the participant's situation. For example, how many clients can they obtain, and in what time. The second issue involves when participants are involved in a soft skills program, and there can be many different impacts depending on where they are working. For example, a leadership program designed for all first-level managers will have a variety of measures depending on where the managers work. In this case, there is a great opportunity for participants who attend the program to select the one or two measures that they want to improve, but only if they can improve the measure(s) using the soft skills with their team. This action creates a customized objective just for a participant and motivates them to improve it.

3. Use performance contracts to drive application and impact. A performance contract is a commitment to take specific actions (application) and achieve a consequence (impact). The focus is usually on impact, and the commitment from the participant is to improve the impact by a certain amount by a particular time. This design has the facilitator (or administrator/owner) and the participant's immediate manager (or significant other if in a pubic or community-based program) signing off on the performance contract.Essentially, this creates a three-way contract for performance improvement agreed to by participants, supported by their manager, and with additional efforts on the part of the facilitator, administrator, and program owner.

4. Create an application guide to enable and support application. For a comprehensive program, it can be helpful to provide an application guide—a tool that provides additional details and instructions as participants use what was learned. If following a particular sequence, the guide provides more detail about the sequence. The guide should contain everything the participants need to know to use what they've learned on the job. It must be developed ahead of time and distributed during the program as a job aid. Participants will use it after the program.

5. Create job aids to use in application. A job aid is similar to an application guide but is usually more visual and less complicated. Sometimes, this just a simple illustration of the steps or sequence of the process they are following. For example, in a fast-food restaurant, job aids are located in the kitchen to help the team prepare the food properly, following a sequence of steps that were learned in virtual learning modules.

6. Have significant other (manager) create expectations before the program. This involves a discussion that would take place between the participant's manager or significant other (if it is a community-based program) before the participant attends the program. The manager will have a very brief conversation, acknowledging the participation and creating expectations for the participant. It is important to provide some simple statements that the manager can use to make it easy. We do not recommend requiring the manager to have an interview or fill out a particular form. This technique should be reserved for very expensive or comprehensive programs where expectations are much more critical. For most situations, a brief 30-second conversation is all that is needed, but this can be prepared by and prompted by the design team.

7. Make it easy to provide application and impact data. In some situations, processes are in place for participants to easily use what they've learned. A checklist of procedures can be utilized for participants to check off completed steps. In other situations, perhaps, links are made available to explain what is needed in each step. The key is to make it as easy as possible for the participant to follow through with what is needed as they apply the learning.

8. Require application and impact data as a basis for participation. In some situations, the expectation for having success are clearly defined. In the program's prerequisite, there may be an indication that participants are expected to use what they learn in the program, have an impact, and that they will be asked to provide the data at specific intervals as the program is conducted. In some instances, this can be a serious issue, suggesting that if you are unwilling to use the content and have an impact, then maybe it is best not to attend the program. In other situations, where a program is being evaluated at Level 3 and Level 4 in a sample, it is suggested that if you are unwilling to provide the data, then maybe you should attend a different group and not participate in the sample. It's a powerful statement and one that focuses on the participant's motivation prior to program implementation.

ACTIONS DURING THE PROGRAM

9. Use action plans to detail application steps. The concept of action plans has been around a long time with its use traced back to the Federal government in the 1950s as the Participant Action Plan Approach (PAPA). Action plans involve the simple concept of having participants list the steps they will take to use the content they are learning in the program. This makes it an application plan. In the last two decades, this has been used for application and impact. The action plan starts with the impact measure that the participant wants to improve and lists the actions that the participant will take to improve the impact measures. This plan not only serves as a way to organize and plan the action steps, but it has motivational ability because the participant now has ownership of the action plan. More importantly, it serves as a data collection tool, as the completed plans are sent to the evaluation team to show the successes for application and impact. *Contact ROI Institute for examples of action plans: info@roiinstitute.net*

10. Action plans presented to the group increase commitment. This technique involves the participants presenting their action plans to the entire group in the learning program. This involves sharing their plan with others and doing this often increases their commitment to the plan. It also enhances the likelihood that they will follow through and do it. After all, they have bonded with their colleagues and have communicated to colleagues what they plan to do with this content. The downside is that it takes some time in the program for the participants to present the plans. In those cases, the facilitator can take the best three plans and have them presented, which puts a little more pressure on the others to follow through with the process. After all, they have just seen the best three plans, and this has a tendency to raise the bar for the remaining plans.

11. Teach to application and impact. When application objectives and impact objectives are developed and provided to all stakeholders, it clearly shows them what they should do after the program (Level 3) and why they are in the program in the first place (Level 4). This instructs the facilitator, program organizer, or administrator (title may vary) to actually teach toward the objectives. An instructional designer will ensure the content, exercises, activities, and materials speak to actual use and the impact. This places the focus on the success of the program, as not what participants have learned but what they will do with what they have learned, and all of the stakeholders are focusing on that as the definition of success—impact and not learning.

This also represents an important mind-shift, as most instructional designers have perceived that their work is finished when participants learn. Unfortunately, if participants don't use what they've learned, and there is no corresponding impact within the organization, then the program is a waste. The top executives who allocate budgets for virtual learning clearly want to see the impact from the program. In their minds, the success of the learning program is not reached until the impacts have been achieved. This puts a proper focus on all the activities to basically teach to those Level 3 and Level 4 objectives.

12. Review Level 3 and Level 4 follow-up questionnaire. The most common method for capturing the application and impact data is to use a questionnaire. When this technique is used, it is helpful to review the questionnaire in the learning program in the last learning module. This action involves going over the questionnaire question-by-question, making sure the participants understand the question and the data needed. The conversation should end with a commitment from the participants that they will provide the data when the questionnaire is sent to them after the program is completed. This shows them what they need to be doing and the data that they will need to be successful and complete the questionnaire.

TECHNOLOGY-ENABLED ACTIONS

13. Create coaching videos. This involves preparing a video that coaches participants through a process, asks questions, gives feedback, and provides advice and tips that can be used at specific points as it applies to the content. For example, if you are teaching negotiations, prepare a coaching video designed for participants to review just before the participant enters the negotiation session. If you are teaching someone to calm down an upset customer, they might review the coaching video just before they speak with their first angry customer. The video is a way of providing coaching that will be available to participants whenever they need it.

14. Use apps to encourage and enable the use of content. Sometimes, if the program involves many participants, it may be helpful to create an app that participants can use to access real-time information. The app can be used when needed to provide encouragement, prompts, and assistance using the program's content. It may bring up the critical information they need or review techniques or a video of performing the task correctly. It aims to help participants use what they have learned.

15. Use guided support software to enable application. In larger-scale systems, it can be helpful to create software that guides the individual through the application and use. This software prompts them, assists them, or completes the task for them, providing feedback as they use what they have been taught to do. It essentially guides the participants to successful use of the process. Studies using this type of software have shown that the ROI increases significantly with just the use of guided support software.

16. Use selfies with the customer after the sale. This technique may be unique to individuals in the sales area, although it can work in other settings. This action is taken at the end of the process when another person is involved, such as in a sales scenario, when a satisfied customer has just purchased an item. For example, this was used in a telecom store where participants have learned how to sell a particular product in a virtual learning program. Selling the product required access to a database that reflected information about the customer and the product. When the participant sold the customer the new product in the store, the participant asked the customer, "Do you mind if I take a selfie with you with my database in the background?" Some customers may not want to do this, but many of them will. The selfie they are taking with the customer with the database in the background provides a connection between this program and that sale, showing (application) evidence the database in the background and the satisfied customer who just made a sale (impact).

17. Use Riff Analytics to gauge effectiveness of communication in virtual conversations. Riff Analytics analyzes conversations between people and tracks not only how much conversation each person is providing but the tone, quality, and dominance of the conversation. This can help in some soft skills programs to see how the skills are being used and applied on the job.

18. Use social media groups to network for encouragement, support, and enablement. Sometimes, it is helpful to create a group of participants using WhatsApp, Facebook, LinkedIn, or other social media platforms to keep the group together and in conversation. The facilitator of the group can encourage application, bring up application issues, collect success stories, facilitate communication, as well as discuss barriers, obstacles, and impediments to success.

19. Post recorded content reviews. This is a video that features a summary of the topic or content covered. For a quick review, participants can access it as a refresher, reminder, or as a prompt just before they need to use it. This could be the same video used in the program, easily accessible to participants.

20. Use automated reminders for application and impact. Use routine messaging with participants to encourage them to share their successes and the concerns that they have. Provide options to contact someone if there is a problem or a concern. The intent is to share a reminder that they should be doing something, sent in a helpful and timely manner.

ACTIONS AFTER THE PROGRAM

21. Organize a group coaching session. This will help participants use the content. It is helpful to have a group coaching session where all participants are encouraged to attend but is not required. These can be weekly sessions at a set time and participants can tune-in and discuss their issues or concerns. This is a great technique for uncovering and confronting barriers. It's also a great way to share success stories and find impediments to success that can be removed.

22. Apply nudging techniques from "Inside the Nudge Unit." An interesting book, *Inside the Nudge Unit (Halpern, 2015)*, describes simple techniques that can be used to nudge people to do things. It is based on a unit inside the UK government in London that focuses on nudging citizens to pay taxes, send in documents, or taking important and necessary actions. This book is full of techniques that can be used to change a person's behavior. One example is to remind individuals at specific times by saying, "Most successful people in this program are using at least three of the five skills routinely by this time." By indicating that others are using these skills, it puts pressure on others to do it. There are many other nudging techniques that can make a difference in getting people to do something.

23. Collect action plans in a follow-up period. The action plans that were developed and described earlier are now collected in the post-program period. The action plans are usually collected after a few reminders are given, telling the participants that they are due and an offer to provide assistance, support, or any information needed before returning the action plan. The participants are also reminded that the action plan, when completed, shows a road map of their success, which is good information for them. It is also helpful information that can be used to make improvements to the program.

24. Organize follow-up sessions to share results. At a certain point, when results are available either at Level 3, Level 4, or both, schedule a follow-up session. This information is included in the last learning module and is a way for participants to report results. This is powerful because you will usually have near 100-percent attendance, and the purpose is to share results. The results can be communicated verbally, as a focus group, or shared by completing a questionnaire together as a group. It can be powerful because of the high level of involvement in the process.

25. Use an on-the-job trainer to support application. This is the tried-and-true technique of having an on-the-job trainer in a particular area to follow up with participants, check on participants, and help them as they have questions. This essentially facilitates application and impact.

26. Provide encouragement from the manager (significant other). This is a follow up on the preprogram expectation and involves what the manager would say immediately upon completing the program. This includes asking the participant about the program, the success of the program, reminding them to ask for help if they need it, and providing any support that may be needed. It basically involves letting the participants know that the manager is expecting them to use the knowledge and skills from the program, and that use should have an impact. This technique is one of the most powerful transfer-of-learning processes and can be built into a virtual learning program. This works best when the design team provides the conversation summaries and prompts to the managers, so they don't have to think through the process.

27. Host a lessons-learned meeting once participants have used the content. This technique has a slightly different focus. After the participants have used the content, at a predetermined time, a lessons-learned session is held, where individuals will reflect on what they have learned from the actual use. This provides an excellent opportunity to bring up impediments and barriers to success so that collectively the participants can help each other overcome them. This meeting is also motivational because participants begin to see how others have made progress, thereby motivating others to do the same.

28. Share success with other participants. When data is collected, it is best to commit to sharing the success of that data with other participants. For example, data have been collected at Level 3, and you are still waiting on Level 4 data to be collected at a later time. The data that has been collected is shared with the participants, showing how successful others have been. This sometimes puts pressure on those who have not been successful to step up and make some impact happen by the desired time.

29. Hold a contest based on achieving success for application and impact. The contest is an incentive for participants to use the material. The contest goal can be recognition, or it can be some type of valuable incentive for those doing the best job. The focus is on ensuring that participants follow-through, are successful, and report this success. You are rewarding those who are doing the best job and hopefully motivating those who are not doing as well to step up and make progress.

30. Use peer feedback for on-the-job performance. In some programs, it may be helpful and feasible for participants to share feedback to each other regarding how it's working. If participants observe others with the skill set and are encouraged to support each other by giving positive recognition when they see something has been done properly, they will also provide assistance and support when activities are not done properly. This technique is helpful if the organizational culture permits this kind of candid conversations from colleagues.

CONCLUSION

WHEN IT COMES TO DELIVERING RESULTS FROM VIRTUAL LEARNING, HOPE IS NOT A STRATEGY; LUCK IS NOT A FACTOR; DOING NOTHING IS NOT AN OPTION.

These are 30 techniques that can enhance the success participants will have with virtual learning at the application and impact levels. Remember, if there is no success at application, there will be no success at impact, and from an organizational perspective, the program is essentially a waste. This has shifted the definition of the success of learning. The definition of success is not when learning has occurred, but when learning is used. This new definition of success represents a mind-shift for many instructional system designers, suggesting that success is not achieved until the impact has been achieved. If someone is not convinced that impact is a measure of success, just ask a senior executive or a chief financial officer. They will quickly reply that if learning is not used with a corresponding impact that is desired in the organization, then it is not successful.

When it comes to delivering results from virtual learning, hope is not a strategy; luck is not a factor; doing nothing is not an option. The accountability for virtual learning has shifted. Change is inevitable; progress is optional. It's up to each of us to make sure virtual learning is designed to deliver the desired results. Otherwise, it is a waste for the organization and the people involved.

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