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## APPLYING SOCIAL TOOLS TO LEARNING

by David Wilkins



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**S**ocial learning is an inevitable response to the incredible increases in knowledge work over the last 70 years. Mature economies have effectively transitioned from manufacturing powerhouses to human capital powerhouses. According to the 2010 McKinsey Global Survey, “Economic Conditions Snapshot,” knowledge workers have driven more than 70 percent of the economic growth in the United States over the past three decades, and 85 percent of the new jobs created in the past decade have required complex knowledge skills.

While the nature of work has been changing, so too have the technologies and cultural norms that underpin worker expectations and skills. Smartphones, tablets, Internet access, and social and professional networks are no longer hallmarks of the elite. Self-expression and instant access to information and content, via YouTube, Facebook, LinkedIn, Wikipedia, and other web-based platforms, are basic assumptions of modern life. Increasingly, consumer adoption of technology is outpacing corporate adoption.

Nowhere is this disconnect more stark than in the domain of learning. In the business world, the majority of corporations deliver the majority of their training in classroom settings (still more than 60 percent, according to Bersin & Associates). Yet in our personal lives, we can learn almost anything about almost anything via YouTube, blogs, Wikipedia, discussion forums, “ask an expert” sites, peer networking in LinkedIn groups, Facebook groups, and any number of specialty sites that address specific topics. This disconnect between our personal and professional experience, coupled with a fundamental shift from a goods economy to a networked, knowledge economy is forcing companies to radically rethink how they deliver training and consider a strategic social learning approach.

Social learning, as a concept, has been gaining steam for several years now, and is beginning to transition from experiment to integrated practice. In this period of transition, the key challenge is no longer proving the value of social learning, but integrating social learning into a larger learning strategy. With the advent of social technologies,

we can begin using new tools to address long-standing learning needs more effectively.

We can begin capturing the expertise, unique knowledge, and experience of our entire employee base in ways that help the organization to grow and learn as a whole, rather than as a collection of individuals. We have the tools that enable us to share expertise from the top-down as we’ve always done, but also from side-to-side and from the bottom up. And for many of us, the tools already exist within our enterprises, either as a collection of stand-alone experiments or as a rapidly-crystalizing social infrastructure.

This *Infoline* will show you how to design more effective and agile social learning strategies that address the unique needs of each learning initiative and each learning culture by explaining

- the three primary models of learning
- how to use the learning models to guide strategy development and tool selection
- how social tools can be applied to typical learning programs, depending on the learning goals
- what to consider when developing a technical infrastructure to support social learning efforts.

## THREE LEARNING MODELS

As Tony Bingham and Marcia Conner noted in *The New Social Learning*, social learning is “learning with and from others.” This simple, clean definition includes the face-to-face learning that has been happening since the caveman taught his cave-dwelling colleagues how to hunt, as well as more modern approaches to learning such as wikis, social networking, and discussion forums. If we were to define formal learning, we might simply say “learning accepted best practices or processes as defined by recognized experts.” As with social learning, this might happen through technology, such as web-based training or virtual classrooms, but could just as readily be delivered in person through instructor-led events or mentoring experiences.

## EMERGENT LEARNING ASSESSMENT



How do you know when emergent learning practices might be the answer? If you can answer “yes” to most of the questions below, or a strong “yes” to a few of these questions, then your initiative probably has some significant emergent overtones.

1. Is your business or initiative dependent on the creation of new ideas, new processes, new products, or new services to drive key performance indicators?
2. Is your team’s intellectual effort primarily used to solve novel challenges or problems?
3. Is your team’s intellectual effort primarily focused on creating new solutions to existing problems?
4. Are your team’s best practices based on principles and theory (as opposed to concrete steps and rote processes)?
5. Do your best practices frequently emerge “from the trenches”?
6. Do you need to rely on knowledge sharing among diverse groups either within or outside the company walls to drive key performance indicators?
7. When you think about a core contributor on your team, is his or her expertise a result of superior synthesis, invention, or sense-making sorts of skills (as opposed to rapid execution of a known process)?
8. For the majority of your core initiatives, is diversity (either in perspective or expertise) a key element in achieving your project goals or a key performance indicator?
9. In terms of succession planning and talent identification, are your “experts” and leaders identified and nominated by peers?
10. Does issue resolution happen through the ad hoc assembly of networked teams or individuals (versus through formal hierarchies)?

If you answered “yes” to many of the above questions or a strong “yes” to a smaller number, your initiative or even your overall organization may benefit from emergent strategies.

While it may not be apparent at first glance, implicit within these definitions are three social learning models, defined by Harold Jarche and Jay Cross, (“The Future of the Training Department” available at [www.jarche.com](http://www.jarche.com)) who note that learning evolves over time and actively moves through these various stages—emergent, collaborative, and codified. Here is a breakdown of each category.

### Emergent Learning

Emergent learning approaches are primarily about capturing and discovering new ideas and best practices at the “bottom” of the organization. While the vast majority of resources and energy in corporate training departments is expended on training from the top down, a massive amount of learning and discovery happens at the “bottom” of the organization where best practices meet the everyday friction of daily implementation. Learning is an innate aspect of day-to-day client interaction, task completion, and process execution. From these experiences, employees learn new skills; they develop new perspectives; they have epiphanies and see new possibilities. Emergent learning strategies primarily focus on capturing expertise, knowledge, and ideas, and making that content discoverable by others.

Emergent practices are largely characterized by learning infrastructures that support user-generated content and search capabilities. They often will include a means for vetting and rating content (borrowing from collaborative learning models), but these are not the defining models of emergent learning. Emergent practices are best exemplified by ideation technologies, though YouTube, wiki, and blog models are quite common as well.

See the sidebar, *Emergent Learning Assessment*, to determine whether your organization would benefit from emergent learning initiatives.

### Collaborative Learning

Collaborative learning or “learning with and from peers” occurs when ideas are discussed, vetted, and improved upon. This learning is characterized

by knowledge, practices, or ideas that are socially constructed. While this is also true of emergent practices, it is not the defining aspect of that model. In collaborative approaches, learning occurs through

- holding discussions
- sharing existing best practices
- connecting pockets of expertise
- building consensus around policy and procedure.

Collaborative learning, like emergent learning, happens all around us, all the time. Like emergent learning, it's often hidden or at least unnoticed. Here the best analogy isn't an iceberg, but a black market. Official power, communications, and expertise are known and tracked by the organization, but behind this hierarchical, visible, orderly exchange, there is the hidden knowledge economy where people hoard information, wield power based not on hierarchy but on "connections," and barter expertise and knowledge to accomplish organizational objectives. Collaborative learning models provide mechanisms through which this exchange can be more effectively influenced, mined, and monitored, enabling organizations to optimize and support collaboration and professional networking.

Collaborative practices are best exemplified by discussion technologies, social networking models, and dynamic wikis whose purpose is to coordinate activities or arrive at a group consensus regarding a topic. See the sidebar, *Collaborative Learning Assessment*, to determine whether your organization would benefit from collaborative learning initiatives.

### Codified Learning

Codified learning is characterized by knowledge, practices, or policies that are well understood, and well established as recognized, validated solutions. While all codified learning likely had its start as emergent or collaborative learning, it eventually became accepted wisdom. On an organizational level, the decision to make this learning official might be made by recognized subject matter experts or senior leadership. Within industries, these decisions are often made by subject matter experts within certain governing bodies or regulatory

agencies. The core objectives of codified learning fall into a few different buckets:

- efficiency and standardization (make widgets as fast we can)
- safety and regulatory compliance (don't die when making widgets)
- process adherence and certification (make widgets in ways that support the larger supply chain).

## COLLABORATIVE LEARNING ASSESSMENT



How do you know when collaborative learning practices might be the answer? If you can answer "yes" to most of the questions below or a strong "yes" to a few of these questions, then your initiative probably has some significant collaborative overtones.

1. Is your business or initiative dependent on collaboration to drive key performance indicators?
2. Is the success of your team's execution dependent on specialized knowledge?
3. Is the success of your team's execution strongly dependent on the sharing and coordination of distributed expertise?
4. Does your team rely on collaboration and consensus to develop known best practices or processes?
5. Are your company's best practices and domain expertise known in "pockets" organized by geography, shared interest, or network affiliations?
6. Does your team respect the opinions of all contributors (as opposed to just those with hierarchical authority)?
7. Is a large percent of your team organized around common job roles and functions (for example, retail or banking sectors)?
8. Are the problems faced by individual team members frequently faced by other team members in similar job roles?
9. When you think about a core contributor on your team, is his or her value and influence a result of socially-recognized expertise (versus title)?
10. Are key performance indicators driven by socially-validated domain knowledge?

If you answered "yes" to many of the above questions or a strong "yes" to a smaller number, your initiative or even your overall organization may benefit from collaborative strategies.

The core strategies related to codified learning are skill-and knowledge-building, and assessment. While the mechanisms may vary, codified learning models all fall into some variant of this approach. You might be surprised that certain social technologies can actually be used to deliver

codified training. See the sidebar, *Codified Learning Assessment*, to determine whether your organization would benefit from codified learning initiatives.

## CODIFIED LEARNING ASSESSMENT



How do you know when codified learning practices might be the answer? Fortunately, this is one area where many learning professionals have significant expertise. That said, here are a few questions that might help you clarify whether codified approaches make sense. As with the other question lists, the more you can answer “yes” to these questions, the more codified your approach.

1. Is your business or initiative dependent on the efficient execution of known best practices or processes to drive key performance indicators?
2. Is it critical that your team know and adhere to accepted best practices and processes?
3. Will your team expend significant effort in ensuring adherence to known best practices or processes?
4. Will your team’s best practices be based on established steps and rote processes?
5. Do your best practices emerge “from on high”—SME’s, senior leaders, compliance officers, or external agencies?
6. Do you rely on efficient execution of homogenous, geographically co-located teams to drive key performance indicators (for example, factory work or legal teams)?
7. When you think about a core contributor on your team, is his or her value a result of the correct application of accepted processes, rules, or physically-repetitive actions?
8. For the majority of your core initiatives, does acceptance of authority play a role in driving key performance indicators?
9. In terms of succession planning and talent identification, were your existing “experts” and leaders identified through longevity, adherence to process, or manager opinion (versus peer opinion or innovation)?
10. Does coordination and issue resolution happen through existing teams and formal hierarchies (as opposed to ad hoc teams or individual genius)?

The chances are pretty good that you answered “yes” to a lot of these questions. Given our long history of supporting the dissemination of best practices, as well as certification and compliance-related training, a core part of our mandate is support for codified learning.

### Most Organizational Learning is a Mix

In outlining each type of learning, you probably realize that learning in your organization is often a mix of emergent, collaborative, and codified models. Some business units and learners may be dominated by one type, some may be a blend, and for some, the appropriate mix changes over time. Certain organizational objectives may skew the needs in certain directions.

Here are some examples of organizational learning in a manufacturing plant:

- a line worker in the manufacturing plant, normally the recipient of codified training, may have the kernel of an idea that could be the next great innovation (emergent learning).
- a corporate strategist, normally a creator of emergent learning, may have a conversation with a supplier that results in the adoption of a known best practice from a different industry (collaborative learning).
- people in manufacturing leadership roles, normally enforcing codified practices, may be sharing critical information with other plants to circumvent official, codified processes that are flawed.

Understanding these hidden learning needs and opportunities is a critical requirement in defining a solid strategy. Within particular projects there may be a discernable flow to the learning focus over time. This is often most evident in learning that is tied to an initiative such as a software rollout or policy change.

What this means is that while a particular project or learning initiative may suggest certain strategies and solutions, it’s critical to think about the bigger picture and the longer-term plan. Even the most “top-down” training needs can sometimes benefit from the overlay of emergent or collaborative approaches. Similarly, even emergent learning models can sometimes benefit from the overlay of expert vetting, certification, or approval.

## UNDERSTAND PROBLEMS AND SOCIAL OPPORTUNITIES

Learning professionals now have the tools to support emergent, collaborative, and codified learning, or any mix of the three. Given that most organizational learning needs require a blended approach, the natural next question is how do you blend and when.

Against this conceptual framework, it's obvious that designing social learning strategies isn't as simple as turning on a blog or a wiki, or asking for learners to share thoughts in a discussion forum. We first need to step back and ask: "What is the nature of the problem we are trying to solve with learning?"

- Is the problem primarily about capturing new ideas, innovations, emerging best practices or unique, specialized skills? If so, a learning plan that focuses on emerging practices may be best.
- Is the problem about collaborating around best practices, new processes, or new policies? Is the challenge related to sharing known best practices that are used in one location or group but not others? If so, learning strategies that focus on collaboration models might make sense.
- Is the core challenge related to the rapid dissemination or adoption of known best practices or the rote performance or adherence to policy or procedure? In this case, you might want to focus more on learning strategies supporting codified practices.

Without understanding the core problems you are trying to solve, the mere presence of a wiki, blog, or discussion will not solve the problem. In short, when it comes to social learning approaches, knowing "why" is far more important than knowing "how." "How" is the easy part; "why" requires significant thought and analysis.

Once you understand your problem, you can move on to selecting your tool. Remember, a single tool can be used in a variety of ways. For example, even something as well understood as a blog can be used for multiple learning purposes. Let's look at some of the ways you might use a blog:

- If the purpose is to capture and document expertise, a blog can be used to publish articles on given topics. A key metric might be the number and quality of the posts. However, in this case, the core challenge might be equally solved with a wiki strategy or even a document-based strategy.
- If the purpose is to communicate and create dialogue, a blog can also be used. One way to do this is create a "blog carnival" where multiple people write on the same topic, linking to each other's posts, often with follow-up pieces that react to the ideas espoused by others.
- If the key purpose is top-down communication, a blog can be authored by a known subject matter expert, or recognized authority. In this sense, a blog, while based on social media technology, may not necessarily be all that social.

## APPLY SOCIAL LEARNING TO COMMON TRAINING PROGRAMS

While there are no hard and fast solutions to learning challenges, there are some obvious starting points, particularly around common learning and training programs such as software rollouts (and similar initiatives), leadership training, and compliance and certification.

### Software Rollouts

With the availability of new technologies and the adoption of social media within corporations, learning professionals now have the tools to influence and support all organizational learning, not just the transfer of expertise from the experts to the masses. In the case of software training, a shift in perspective toward supporting the full learning lifecycle presents an interesting set of challenges and opportunities.

### The Rollout: Codified Communication, Pre-Work, and Training

Software rollouts follow a fairly predictable pattern that suggests when and how various strategies can be applied. A software rollout is, above all else, a change management event. Like any change management event, there are several common

stages: pre-rollout and communication, training, go-live, post-rollout chaos, revision and update, and codification and communication of changes.

**Pre-Rollout and Communication.** While trainers are not always involved in this effort, it's important to understand the key elements of this stage, notably:

- communication campaigns, often including FAQ's, brown-bag lunches, and explanations of challenges with the current state
- engaging and level-setting learners through pre-work that communicates "what's in it for them" (WIIFM) as well as expected end states and larger organizational objectives.

## SOCIAL STRATEGIES TO SUPPORT EMERGENT LEARNING



The key focus is on capturing or discovering new expertise, ideas, or information from the employees. In some cases, this might be the sharing of unique files, a practice that has been typically facilitated by a knowledge management tool, and more recently by social platforms and even learning management systems. In other cases, this might mean documenting expertise, job history, and unique skills via deep social profiles. In all cases, these solutions are designed to enable learners to capture and share their unique expertise, ideas, or perspectives through a supporting infrastructure that does not require significant involvement.

A partial list of emergent practices is below:

- File-sharing, including video, audio, PDF, and Office docs
- Blogging
- Microblogging
- Discussion forum
- Idea-sharing
- Wikis
- Tagging
- Chat/IM
- FAQ /Ask an Expert
- Social profiles
- Role-playing

In the event you do participate in these efforts, you can consider the use of emergent and collaborative models to support more traditional top-down communications. For example, you could create a contest in which employees share the biggest reasons why the organization needs to upgrade/innovate/change whatever process, technology, or policy is undergoing the change. Perhaps you could combine user-generated video (emergent) with crowd-sourced ratings (collaborative) to choose a winner. This kind of activity is effectively a company-wide variant of what good trainers do in the classroom before introducing a new concept.

**Training.** Training is typically done as close to go-live as possible, a challenge made easier with the advent of e-learning and virtual classroom models. The obvious tactic here is to deploy some sort of training to teach learners about the changed processes, expectations, policies, and procedures around the new or upgraded system right before rollout (to minimize the "forgetting curve" before learners begin actively applying their new skills). For too many training organizations, this is the end of the journey until the next major upgrade.

**Post-Rollout Chaos: Support for Emergent Learning.** Shortly after rollout, learners will inevitably discover gaps, flaws, and erroneous assumptions. This is sometimes referred in business circles as "all hell breaks loose." While most rollouts aren't quite that bad, a typical problem is that in the absence of formal capture mechanisms, only the most serious issues rise to the top. With a social infrastructure in place, you can capture new ideas, flawed assumptions, workarounds, and problems ranging in scope from trivial to massive. This learning should be captured and shared with the launch team and related subject matter experts as soon as possible. This is a classic emergent learning scenario. See the sidebar, *Social Strategies to Support Emergent Learning*, for a list of possible social learning solutions for this scenario.



**Revising the Process: Support for Collaborative Learning.** With this new information, subject matter experts and project sponsors then need to decide on revised best practices, procedures, and policies. Smart teams will also bring in the users who first reported the issues to better understand the real-world implications and recommendations. This is a classic collaborative learning scenario. See the sidebar, *Social Strategies to Support Collaborative Learning*, for a list of possible social learning solutions for this scenario.

**Communicating the New Processes: Support for New Codified Learning.** Once the collective team decides on new approaches, these need to be communicated with the larger learning audience as quickly as possible and then, depending on the scope and depth of the change, these changes should result in updated training materials for existing cohorts or future cohorts. This is effectively the start of a new codified round of training. See the sidebar, *Social Strategies to Support Codified Learning*, for a list of possible social learning solutions.

While the above model is overly simplified, the basic components are true for nearly every major change initiative. As a trainer, your participation in each stage may vary, but the more involved you are in your organization's social strategy, the more value and impact you can bring to each stage, thereby increasing your strategy value within the business.

### Leadership Training

Like software rollouts and related initiatives, leadership development training also has a typical "flow" and pattern. Typically, a cohort of leaders is identified to be part of a leadership training initiative. The next step is usually notification and communication which serves similar purposes as this stage in software rollouts: WIIFM and expectation setting. While the next step varies by organization, it typically involves some kind of pre-work (self-assessments, identification of personal objectives, conversations with managers, and so on), followed by some amount of training, typically web-based courseware or virtual classroom to level-set participants before kick-off and the start of instructor-led events.

While the details of company-specific leadership training programs are different, a common practice is for cohort groups to meet on a regular schedule for some period of time: monthly for a year, quarterly for two years, and so on. Whatever the schedule, the model is characterized by intense in-person, experiential learning, followed by long periods of learner-directed activity and real-world application of skills. A key aspect of leadership

## SOCIAL STRATEGIES TO SUPPORT COLLABORATIVE LEARNING



The core objective for collaborative learning is to share or connect expertise across groups or individuals. You might notice overlaps in the technologies and approaches between emergent and collaborative practices. Why? Technology is not the driver of your strategy; it is the mechanism through which your vision is manifest. A wiki can be used to document individual areas of expertise, or it can be used to document the collective expertise of an extended team or to coordinate activities of an extended team. The first example would specifically address challenges related to emergent learning needs while the latter two would help solve problems related to coordination. Likewise, while the creation of social profiles is primarily about the issue of emergence, the searching of profiles is primarily about collaboration. A partial list of collaborative practices is below:

- Discussion forums
- ListServes
- Wikis
- Idea-sharing
- Ratings/reviews
- Blogging
- Microblogging
- FAQ/Ask an Expert
- Social profiles
- Tagging
- Social bookmarks
- Chat/IM
- Shared spaces
- Role-playing

## SOCIAL STRATEGIES TO SUPPORT CODIFIED LEARNING



As with emergent and collaborative approaches, the “why” is more important than the “how.” If you use a blog to deliver training materials between in-person classes for a several week-long training event, the blog isn’t necessarily a social learning tool (though it can be). Similarly, if wikis are used by recognized company experts to document known expertise, then this is still mainly a codified approach, not necessarily a social one, regardless of the technologies used. Understanding the desired outcome is a critical aspect of success in designing social learning strategies. A partial list of codified practices is below:

- Serious games
- Blogs
- Microblogging
- Wikis
- Role-playing

development is self-awareness regarding individual strengths and proclivities. This is clearly an emergent challenge, but it’s one that can be tackled through thoughtful learning exercises (codified) and group discussions (collaborative).

### Between Events: Support for Collaborative Learning

Many leaders feel comfortable sharing their experiences with each other and learning from the experiences of their peers, thus providing ample opportunity for collaborative learning. Many leaders also rightly view professional networking as a key benefit of leadership training experiences. As noted earlier, networking and connections are a key aspect of collaborative learning.

Some activities and infrastructure that learning professionals can put in place to support collaborative learning include shared spaces where cohort groups can connect, share experiences, and deepen their relationships in between classroom events. Spaces like these don’t need to be elaborate and can include discussion forums and blogs.

You may be wondering which platform works best—forums or a blog. As with nearly all social technology decisions, the key question isn’t whether you need a blog or a discussion technology, it’s about strategy and objectives. Blogs are better suited for strategies that rely on more “refresher” content—video, longer and more complex textual elements, and images. Discussion approaches might be better suited for more experienced leaders who are primarily interested in sharing stories and experiences.

### Certification and Compliance

For many, it’s difficult to see the social learning angle within certification and compliance initiatives. Clearly, these are codified models where known expertise and best practices (or at least mandated practices) are passed from experts to the rank and file. It’s tempting to think that within these established policies and procedures, there is little room for interpretation, doubt, or situational vagaries. It’s also tempting to think that learners have little value to add in discussing or sharing stories around certification and compliance initiatives. Of course, making the above assumptions would be flat out wrong.

### Applying Theory to Real-World Scenarios

If we step back from the obvious codified nature of certification and compliance initiatives, it’s clear that there is emergent and collaborative learning happening at the edges of these mandates. For example, Joe doesn’t understand whether particular ethics rules apply in a certain situation, so he asks a colleague. Sally notices that certain kinds of fiduciary relationships aren’t covered in the latest policy statement and isn’t sure how to proceed. No one is clear what the training meant when it said that “all employees can be subject to disciplinary action, up to and including termination” since the rule in question only applies to “insiders.” Nearly all certification and compliance training requires the application of theoretical rules to real-world situations, which often results in emergent and collaborative learning scenarios.

The question of course is whether you want emergent or collaborative learning to happen in

these cases. You certainly do not want colleagues advising each other about legal matters or the interpretation of compliance rules; however, you do want to establish a mechanism through which these questions are raised. In the absence of a clear channel to ask questions and receive official responses, it's quite likely that this kind of peer-to-peer advice is well-established.

This is where “social interaction as formal conduit” can be an effective strategy. You can set up social channels such as:

- discussion forums related to certification and compliance topics. You can provide an easy way to capture questions and oversights regarding policy and provide official answers and responses that are visible to everyone, thereby minimizing hearsay answers. In this case, social technology is actually used to minimize social exchanges by providing an obvious centralized channel for questions, thereby putting a damper of emergent and collaborative learning around sensitive subjects without limiting learners' access to answers.
- a badging model. Discussion forums need to be carefully regulated, but the sorts of stories learners share through this platform are key ways learners can more effectively internalize esoteric rules and compliance legalese. In a badging model, a moderator (usually a subject matter expert) can put a “stamp of approval” on a given post, which is then marked by a badge. In this approach, user-generated content is “blessed” by official experts, effectively blending emergent and collaborative learning models with codified approaches.

## IMPLEMENT YOUR SOCIAL STRATEGY

By now you should understand how your social learning needs fit into the larger context of emergent, collaborative, and codified learning challenges. This requires a deep audience analysis to determine employees' comfort level with various social approaches—their needs, their technologies, and their access patterns (mobile, desktop, or some combination of both).

You should have also taken some time to think through possible solutions and combinations of solutions to solve your learning challenges, keeping in mind of course the afore-mentioned audience analysis. With clearly-defined business challenges, a clear understanding of learner needs, and a list of possible initiatives, your next step is to understand the broader social landscape within the business.

Stated bluntly, your social infrastructure is probably pretty messy. Most organizations are in one of three stages:

- adamantly opposed to social anything
- in the midst of social experimentation with multiple systems
- on the path to rationalizing social practices via standardization on one (or more) social platforms.

In the first case, it's possible that you have zero social infrastructure. While not ideal from a delivery perspective, this presents you with an amazing opportunity to be a change agent within your organization and champion these sorts of approaches. Such opportunities are fading fast, so if you find yourself in this situation, take advantage of the opportunity.

The vast majority of learning professionals today fall in the second or third category, which in most cases means that you need to choose from among multiple social platforms. While it may be tempting to pick the solution that best fits your defined needs, don't forget to think more long-term. The change management efforts involved in social learning initiatives are significant; the last thing you want to do is facilitate adoption of a social platform that your IT department will later abandon in favor of a more standardized platform that addresses multiple needs. Following are five steps to help you assess and determine the infrastructure needs of your organization.

### Step 1: Assess Current Social Platforms

Your first task is to identify your current social platforms and their owners. It's possible that there are multiple key stakeholders—typically these will include IT, Corporate Communications, Compliance (if there is a knowledge management component), and sometimes Product Development in a software company. In some companies, IT ultimately owns the social platform; in others, it's Corporate Communications.

### Step 2: Evaluate Existing Systems with Social Elements

You might also have a Learning Management System or a Talent Management System with strong social elements. These solutions are likely owned by HR. While it might be tempting to leverage these tools, this may not be the best approach. You really need to step back and evaluate which strategy and owner has the greatest chance of success in the long run.

You also need to define a coherent logic chain for how you might leverage multiple social learning platforms. For example, if you are training sales people and they are already using Chatter from Salesforce, then you'd need a pretty compelling argument to leverage your LMS's social capabilities or even those of an internal SharePoint implementation. And even with a compelling argument, you might find that learners fail to take advantage of these multiple platforms.

Sometimes it makes more sense to utilize one system for social learning. For example, if you are creating shared spaces for a leadership cohort and your LMS supports this capability, it might make sense to keep this in the LMS—it's contextually relevant to the completion of the leadership training and it means that participants can more easily leverage the course materials in support of ongoing engagement and social learning activities. A similar argument can be made for ratings and reviews, comments, and external RSS feeds that are specifically about formal training courses. In this case, you wouldn't want learners to leave the LMS to comment on a course; it just doesn't make sense, no more sense than leaving Amazon.com to rate a book on another site.

### Step 3: Leverage Tools for Non-Course Related Material

Ideation technologies, open discussion forums, wikis, microblogging tools, social networking capabilities—none of these are LMS- or courseware-specific. These are usually part of a social platform infrastructure that is typically owned by IT or Corporate Communications. When considering how you leverage these tools (and which tool to choose if there are multiple), you want to have discussions with the infrastructure owners to understand how you can integrate these approaches into your learning strategies.

### Step 4: Understand Technical and Authority Issues

This step covers technical topics like single sign-on and deep-linking between your social platform and your LMS (in both directions), as well as questions of ownership and authority. In the technical "how" discussion, in addition to integration questions, you also want to be sure to understand current and planned social capabilities, permissions, privacy, search, audience/content segmentation, reporting, and analytics.

In the discussion about ownership and authority, you need to understand the scope of what you can do on your own and where you'll need assistance or buy-in from the infrastructure owner, especially when it comes to understanding accepted practices regarding media, links, and sensitive materials, as well as archival and compliance-related processes. You also want to be sure to adhere to any social media policies in the event you are leveraging external social media as part of your strategy (Facebook or LinkedIn groups, Twitter, YouTube or Vimeo channels).

## Step 5: Learn About Social Governance

Lastly, you might want to inquire about a social governance board. Leading companies are now creating these boards to more effectively define social strategies and resulting capabilities adoption that meet the diverse needs of the company.

A learning perspective on such a board would be particularly valuable given the skills and experiences of learning professionals, notably skills around building trust and rapport, communicating complex subjects clearly for general consumption, change management and adoption experience, and information design expertise.

## A SOCIAL LEARNING ADVOCATE

With social approaches, the whole company is part of the learning and development team. Is social learning outside the scope of your role? It depends on how you define yourself—are you a learning professional or an instructional designer? The former should care about all kinds of learning, no matter where or how it happens in the organization; the latter is primarily about delivering expertise to the masses via codified approaches. The choice to become an advocate for social learning in your organization is yours to make.

Over time, we will become increasingly sophisticated in blending these models into our existing formal approaches. We will also become increasingly sophisticated in how we use social learning to solve problems and more effectively tap into the collective wisdom and expertise of our learners. But, in order to realize this sophisticated future, we need to start embracing these concepts and design principles today.

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## PROMOTING EMPLOYEE PARTICIPATION IN SOCIAL LEARNING

Due to ROI pressures and business requirements, corporate social learning communities need to aim for higher percentages of active participation and contribution, following a different launch and growth strategy for their initiatives than the “if you build it, they will come” approach that characterized early consumer-facing social media communities. Here are some suggestions for building employees’ self-efficacy with social media tools and strategies, as well as tips for moderating:

### DEVELOP EMPLOYEES’ SELF-CONFIDENCE

- Set up areas in your learning community where people can share their perspective and expertise on subjects outside of work-related topics. This will provide a place for people to connect across disciplines, driving cross-pollination of ideas and insights, and it will enable people to showcase their unique expertise, helping them develop confidence.
- Enable “low-level” participation through ratings and simple recommendations as a gateway to higher-order participation.
- Acknowledge their fears and provide encouragement through direct messages from senior leaders.

### DEVELOP EMPLOYEES’ SELF-ESTEEM

- Provide fun, extrinsic rewards for participating in social learning initiatives: clothing, paperweights, key chains—something tied to the initiative and tied to the learning community, but lacking in significant monetary value. Highly valuable extrinsic rewards have been shown to decrease internal motivation, while rewards of recognition and acknowledgement have been shown to increase motivation.
- Encourage senior management to respond positively to contributions from all parties even if they disagree with an idea. Initially, it’s far more important that people are valued for contributing at all than for contributing the perfect post.

### BUILD THE PLATFORM

- Seed the community with content. No one wants to post into an empty forum or be the first to write a blog comment or submit a new idea. Add some innocuous posts and even responses to encourage people to join in to what appears to be an active discussion.
- Do “barn-raising” where everyone contributes content to populate the platform.
- Don’t “boil the ocean.” It’s much better to start with one or two kinds of social learning environments—one or two forum threads, a few broadly-focused blogs, a ratings and review capability—than a bit of everything. Fewer kinds of social media and fewer topic areas will initially concentrate activity and make the community seem more active and larger than it is. This in turn will drive participation by tapping into a “joiner” tendency—when an activity or destination looks to be popular, people are more likely to join in.

### DEVELOP EMPLOYEES’ TRUST

- Establish “rules of engagement.” What kinds of behaviors are not allowed? Flame wars and personal attacks on discussion boards or in blog comments are clearly unacceptable, but what about shooting down ideas in disrespectful ways? Or contributing incorrect, poor-quality, or inappropriate content? If someone violates the rules of engagement, swift actions should be taken to correct the situation.
- While managers should tread lightly in stifling opposing viewpoints, they should be very comfortable in pulling down incorrect posts, particularly if the content exposes the organization to legal, regulatory, or compliance-related risks.

## PROMOTING EMPLOYEE PARTICIPATION IN SOCIAL LEARNING (CONTINUED)

It's important that the social learning environment is a safe environment: Part of that stems from enforcing civility and fairness, part of it comes from allowing for genuine differences of opinion, and part of it comes from knowing that the content is accurate and monitored.

### DEVELOP CULTURAL AWARENESS

- While there will likely be many employees for whom social media is “old hat,” for the vast majority, even among younger generations, this is new territory. Provide them a “Miss Manners Guide” on expected behavior and norms: When does it make sense to friend someone? Should I link back to my own post as a reply to theirs or should I comment on their post? Is it okay to share someone's contact info to a third party without asking them first?
- The “Rules of Engagement” mentioned above provide guidelines for what participants shouldn't do. It's equally important to tell them what they “should” do. What are some of the positive behaviors you expect? What is the tone and tenor of the space you are creating?

### DEVELOP EMPLOYEES' TECHNICAL KNOWLEDGE AND APTITUDE

- As with “cultural awareness,” many employees will be better at this than you. But it's also possible that their advanced skills may be narrow—someone may be an expert in blogging, but a newbie at wikis. Or maybe someone hasn't used RSS feeds or tagging before, but lives on discussion boards. Ironically, in the rush to use social media and social learning, one of the first things we may need to do is develop some courses or formal material to make sure everyone is on the same page regarding basic skills, so that they feel empowered to contribute.
- Also consider a good help system or electronic performance support model so that if participants start slowly, they can build their skills over time, not just by learning about it, but by actively contributing.

Addressing these fundamental issues will go a long way toward addressing the challenge of self-efficacy and participation in your social learning community.

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## SOCIAL LEARNING STRATEGY CHECKLIST

Organizational adoption of social media as a comprehensive learning strategy is one part software rollout, one part transformational change, and one part large scale corporate initiative. Depending on your initial focus, it might involve a single cohort group, your whole company, your partners or suppliers, your clients, or even the public at large. Regardless of your scope, there are a number of critical items that you must address in order to achieve success. While you may not need to address all of the issues below on your particular initiative, you should at least consider the implications and issues for each item below, and where necessary, develop a plan of action to address those that are relevant to your situation.

### CULTURE

What do you want it to be? What is it today?

- Openness vs. planning? Where is your balance point?
- Autonomy and self-direction vs. top-down mandates? Where is your balance point?
- What do executives, key stakeholders and “rank-and-file” think about social media and sharing?
- What are your organizational attitudes about transparency?
- To what extent do learners take personal responsibility and accountability for their learning?

### APPROACH AND METHODS

What kind of social learning models are you pursuing? How do they integrate?

- Codified?
- Collaborative?
- Emergent?
- What kinds of social learning interventions do you need?
- How will your social media elements interact with your Learning Management System?
- If social learning happens outside the LMS, what will happen where?
- If social learning happens outside the LMS, how will you see a unified view of learner activity?

### PLANNING

Who owns what? How will you get from point A to point B? How will you mitigate risk?

- What kinds of social media are already being used in the organization?
- For what purpose?
- Who owns them?
- What is your Social Learning Policy?
- What is your plan when these policies are breached?
- What is in your Miss Manners Guide to Social Learning?
- Who is on your Social Learning Governance Board—IT, Legal, CLO, etc.?
- How will social learning activities factor into key performance indicators and performance reviews?



## SOCIAL LEARNING STRATEGY CHECKLIST (CONTINUED)

- Who will support your organization's use of social media? IT? Learning?
- What is your start point in terms of participants and technologies?
- What is the long-term rollout plan? What social media tools will be turned on when? When you do turn on new functionality, what is the trigger—time, membership, activity?
- How will you identify champions and key influencers prior to roll-out and on an on-going basis?

### LAUNCH ACTIVITIES

How will you quickly achieve critical mass? How will you sustain and grow the initiative over time?

- How will you drive traffic and participation in the “early days”? Some suggestions: competitions, rewards, “forcing” through changed process, well-planned programming schedules, middle management expectations, senior level management modeling, social media events—wiki barn-raising, live chats, team video jams, etc.
- How will you ensure that learners have the necessary skills and tools to participate in the conversation and sharing? Things to consider: training on social media tools, training on social media concepts, lots of early recognition and praise.

### PROFESSIONAL DEVELOPMENT, SKILLS, COMPETENCIES

What kinds of skills and competencies do you need to develop as a learning professional?

- Become a social media tools maven—wiki, video, podcast, blogging, microblogging, etc.
- Understand key concepts of Social and Cultural Anthropology.
- Understand key concepts related to Team Building and Team Dynamics.
- Understand key concepts in Social Psychology.
- Understand key issues of self-efficacy as it relates to social media: trust, belonging, self-confidence, self-direction, motivation, skills.
- Knowledge of moderation strategies and key moderation concepts like seeding, facilitating, autonomy, respect, and flow.
- Knowledge of key community management strategies including programming, reward and recognition models, advertising and awareness campaigns, member management.
- Ongoing professional development by networking outside the company through social learning.

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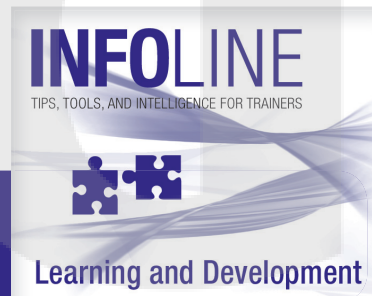
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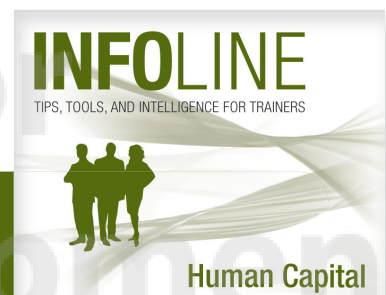
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