Clive Shepherd continues his four-part series for experienced and aspiring learning architects. Here's how to apply a systematic approach.

DESIGNING BLENDED SOLUTIONS

PART 3: SELECTING LEARNING METHODS

Blended learning solves performance problems through the application of a mix of different learning methods and media, both formal and informal. It has become the strategy of choice for organisations around the world because it flexes to support complex learning requirements and varied audiences. It shifts the focus from one-off learning events to on-going processes as employees build skills and confidence in their jobs.

This series of articles, describes a simple process for designing blended solutions that are efficient and effective. This has three stages: (1) analysing the unique characteristics of the situation in which the solution is to be deployed; (2) selecting the right blend of methods to meet the needs of the situation; and (3) determining the most suitable delivery media.

In the first two articles, I explained how to carry out stage one, analysing the situation. This has three elements: the learning, the learners and the logistics – *the three Ls*. Armed with this analysis, we can move on to the most creative stage: selecting the best methods to meet the learning requirements for our audience, within the given constraints.

LEARNING METHODS ARE TIMELESS

Strange as it may seem, the methods we use for teaching and learning have been with us for a very long time. Around 2,400 years ago, Socrates would have had very much the same choices as you do now. If he ever became tired of Socratic questioning, the great man could have employed a wide variety of alternative approaches – lectures, games, role-plays, case studies, demonstrations, assignments, discussions and so on. These methods may go in and out of fashion or be dressed up with fancy new names (witness 'job aids' becoming 'performance support') but essentially they stay the same. As Juliet so wisely remarked, "A rose by any other name would smell as sweet."

Learning methods are the tools we use to facilitate learning. Importantly, they – and not technologies – are what determine whether a solution will be effective. That's why we have to get the methods right first. A blended solution should not involve a trade-off between effectiveness and efficiency. With the process I describe in this series of articles, the idea is to select an effective strategy and then – without compromise – choose the most streamlined mode of delivery. Quality is a given.

So how do we select the most appropriate methods? Well, this is not entirely a rule-based process; it requires you to make

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careful judgements based on what you know of the particular situation and how you apply key learning principles. There are two ways in which you can systematise your decision-making – first, decide on a strategy, and then choose a social context for the learning. Make sure that you consider all the options, rather than relying on the same old, familiar techniques. A good place to start is by selecting the most appropriate overall strategies.

FOUR STRATEGIES FOR LEARNING

Every learning solution, formal or informal, employs one or more of the following four basic options, whether or not this is a conscious decision:

1. Exposition is the simple delivery of information from subject expert to learner, typically as part of a formal syllabus. Examples include lectures, presentations and prescribed reading. The driver for this strategy is very definitely the subject expert, who may or may not have any knowledge of, or any interest in, the process of learning.

Because exposition is relatively unstructured and unsupported, it is best suited to learners with higher levels of prior knowledge, who are quite capable of sorting out the wheat from the chaff and are unlikely to get overwhelmed.

2. Instruction is a much more systematic process which typically starts with the formulation of specific learning objectives and culminates in some form of assessment. Along the way, a variety of approaches and practical exercises may be

used to convey information and help the learner to develop.

Instruction can take place in the classroom, through self-study e-learning or on the job. The driver for this strategy is the instructor or, in the case of self-study materials, the instructional designer. This method is ideally suited to the teaching of routine, *rule-based tasks*, as well as providing the relative novice with adequate structure and support.

3. Guided discovery is also a carefully structured process, but the emphasis here is on setting up activities from which the learner can gain their own insights and come to their own conclusions. Within formal interventions, examples might include the use of scenarios, simulations, case studies and leadership tasks. The strategy can also be employed on the job, using techniques such as coaching, action learning, job enrichment and job rotation.

The driver for this strategy is the facilitator or, in the case of self-study materials, the designer. Guided discovery is best suited to the teaching of *principle-based tasks*, where the learner will be required in their work to make judgments in widely varying situations.

4. Exploration hands control to the learner to make all the choices; there are no pre-defined objectives, no syllabus and no assessment.

The exploration strategy is most likely to be applied in the provision of on-demand support to the learner at work, sometimes in the form of packaged content, sometimes by access to experts. But exploration is also the underlying strategy behind the use of social media at work – communities of practice, forums, wikis, etc. – that allow employees to provide support to each other.

The driver for the exploration is the learner. Having said that, the L&D professional plays an important role as a sort of curator, someone who provides novices with the appropriate tools and supports them in finding the right people and content.

REMAIN AGNOSTIC

The four strategies can be applied to any type of learning intervention. In some cases, different strategies can be used at different stages within a single solution. For example, the use of exposition for essential pre-reading, the use of instruction to convey

important rules, the use of guided discovery to bring out key underlying principles, and the use of exploration for on-going reference.

Some learning professionals stick to one of the strategies almost as a matter of faith – it sums up their philosophy of how learning should be achieved. And for some organisations, the strategy that they use for learning is so pervasive that it has almost become a cultural expectation. In practice, it pays to remain agnostic. Each of these strategies has its place, depending on what needs to be learned and by whom. The trick is to use your judgement in determining which strategy to use and when.

THREE SOCIAL CONTEXTS FOR LEARNING

Regardless of the strategy or strategies that you choose, there is another key decision to make in terms of the people who will be involved in the learning process. Essentially there are three choices: the learner alone, the learner with one other person – typically a coach or instructor – and the learner with a group of peers.

Self-study can range from reading a book at one extreme to engaging in a complex computer simulation at the other. It provides us with a great deal of flexibility as learners because we control the pace at which we learn as well as when, where and for how long. Organisations also benefit from the cost-efficiencies.

Having said that, while self-study can stand alone, it works best in conjunction with other social contexts. We are social animals and naturally want interaction with other human beings at some stage in our learning. The social component allows us to share our experiences, test out ideas, obtain support and compare perspectives.

Self-study also relies on a fair amount of self-motivation and discipline. Somehow there is always some other activity that seems more urgent than our study programme. Hard experience suggests that prolonged periods of self-study need to be timetabled with regular milestones that must be reached by specific dates.

One-to-one learning places the learner with an instructor, a coach, a mentor or a subject expert, whether that's on-job, off-job or remotely. One-to-one learning is highly individualised, which makes it fast and potentially highly effective, but success

depends heavily on the quality of the individual responsible.

One-to-one learning makes a valuable contribution but is extremely costly when compared with other approaches. As a result, it is usually rationed to those situations where there is no other option or where the benefits justify the expense.

Group learning expands the resources available to us as learners to include our peers. This can provide useful benefits in terms of shared insights and experiences, mutual support and a degree of peer pressure, although this comes at the expense of flexibility and individual attention. Group learning can take place live in a physical or virtual classroom. It can also occur at the learner's own pace making use of email, discussion forums, wikis, social networks and similar Web 2.0 technologies.

Each of these three social contexts has major advantages, but also some significant drawbacks. The art is to use each social context in the situations in which its benefits are maximised and its limitations minimised. In practice, this often means using them in combination, as ingredients in a blended solution.

EATING ELEPHANTS

Some learning requirements are relatively straightforward and the most effective methods quickly become evident. On the other hand, we also find ourselves designing solutions for much more complex problems, such as inducting new starters, training apprentices or preparing employees to become managers. In these situations it is hard to pick the most appropriate strategies and social contexts because these need to vary as the intervention progresses.

For this reason, as with eating elephants, it pays to take it one bite at a time. Break your programme down into key stages or elements. For example: Preparing the learner, presenting learning content, providing opportunities for practice, offering feedback, providing space for reflection and planning, application to the real-job environment, and providing on-going support.

The exact nature of these stages will vary widely depending on your objectives and audience. What is important here is that you attempt to separate out those aspects of the learning process that vary in character, because there is a good chance that you'll benefit from using different strategies and different social contexts for each element. This is where the opportunities arise for blended learning.

If you can't sensibly break down the learning process for your given situation, that's not a problem – you can probably save yourself some trouble and use a single approach throughout.

Coming up

Next month, in Part Four of this series, we'll make decisions about the technologies that will most efficiently deliver our chosen methods. This will be the first time in-depth look at whether and to what extent we can usefully employ new media. This is because, however much we love our toys, learning must always come before technology.

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