

# Tracking Informal Learning

Observation, collaboration, and interaction with others are key ways employees learn their jobs and company culture, but can you measure how well it works? **BY MARGERY WEINSTEIN**

**N**ew employees may be given a formal onboarding orientation and an employee handbook, but one of the top ways they learn is informally—through watching, interacting, and collaborating with others. When a new hire spends the first month or two watching co-workers go through the same work processes they are expected to go through, or handling challenging situations they eventually will confront, what is the educational value? Organizations have always known this type of training—also known as social learning—is a vital way to educate employees, but most find it difficult to measure. Here is how three Training Top 125 companies, and two experts in the field, recommend gauging the effectiveness of social learning.

## OBSERVE WORK PERFORMANCE AND OFFER FEEDBACK

Social learning is one of the oldest methods of training, so it's fitting that an effective way to assess it is equally old-fashioned—watching how employees do their jobs. Training Top 125 company Leading Real Estate Companies of the World carefully observes employees who have learned by watching and interacting with others, says Mike Staver, a Learning professional

in the company's Training department. "At our home office, we are certain to spend time with employees, working beside them, to ensure proficiency. Often, employees in our customer service center are listened to and observed handling customer issues," says Staver. "Our IT department uses observation and feedback to develop their people. In the field, our members work with real estate agents on listing presentations, role-playing, and partnering on listing calls made with new agents. As a result, the agent/employee gets real-time feedback."

Staver says a custom online social platform helps employees challenge each other to go further with their learning. "We use a social platform we call 'Our World,' which is an online interactive platform for our members and employees," he says. "Participants often ask questions, share ideas, and challenge each other in the social environment, so ideas and proficiencies can be taught and feedback can be given."

With Millennials' affinity for social media in their everyday lives, creating an internal social media platform where employees can share what





## ALLOW FOR DECENTRALIZED LEARNING AND ASSESSMENT

Since informal learning often occurs within an employee's immediate work group, the best measure of success usually comes from those closest to the employee. Rather than trying to assess from afar how much an employee has learned from observing and interacting with others, Training Top 125 company Enterprise Holdings has those the employee has observed be the judges. "Social learning is critical to a decentralized company with thousands of locations like Enterprise Holdings," says Steven McCarty, vice president, Corporate HR - Talent Development, Enterprise Holdings. "Formal training, whether live or online, can support but never replace the role of the local manager. By developing our managers to develop their employees, we build culture in the most significant, sustainable way possible—by having our branch managers, and not HR, conduct the majority of the development of our people."

McCarty says the company makes good use of job shadowing for new employees. That way, the new employee's manager is able to determine how well the new hire is catching on. The manager can assess if the employee requires more training based on how well the employee is able to assist the more seasoned employee to complete work tasks, or do the tasks on his or her own with the senior employee observing. "We also incorporate shadowing in the interview process in most areas of our company, knowing that observation allows individuals to learn and assess whether or not they are interested in, and capable of, performing similar functions," he says.

Face-to-face meetings, rather than online-only reviews, also are critical to assessing the effectiveness of social learning. McCarty says Enterprise Holdings prefers face-to-face, over online-only, tracking of mentor/mentee pairs. "Many of our local operations have implemented a formal mentoring program," he says. "With these programs, we have found online tracking to be terrific, but it's only part of the solution. In fact, at one point,

they learned may be the easiest way to measure the impact of social learning, says Joelyne Marshall, Learning Solutions manager, Caveo Learning. "Providing employees the opportunity to share what they have learned via social outlets helps to reinforce the organization's viewpoint that social learning, and those platforms, are a valid and useful avenue for learners to continually reinforce their skills and eventually perform better in their jobs," she says.

At the end of the day, Staver says the employee's job performance is the best indication of how well the informal learning worked. For instance, he notes that while mentoring can be a great way for new and up-and-coming employees to observe and interact with more experienced employees, the bottom line is often the best marker of success. "While tracking is challenging," he says, "usually we can see the results in sales results and the anecdotal feedback of the person being mentored."

### QUICK TIPS

- When new employees are hired, have a more senior employee work with them, and offer feedback in real time.
- Use internal social media platforms to encourage employees to share what they've learned and to ask questions about what they still need to learn.
- Decentralize assessment of social learning by allowing those in the employee's immediate work group to be the judges of what additional training the employee needs.
- Offer libraries of online videos for employees to learn from observing both their co-workers and experts outside of the company.
- Gauge the effectiveness of social learning by how well employees do their jobs (sales results, or another concrete marker), and how well they do in formalized training that the social learning may have laid a foundation for.
- Create an office layout that encourages constant interaction and feedback, such as an open floor plan without individual cubicles.

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we thought we might track completely online, but programs lost momentum if they were run solely online. In places where the program is used, we use online tools and tracking, but combine it with in-person meetings with other mentor/mentee pairs.”

## MAKE USE OF MULTIMEDIA

While in-person, face-to-face time with more experienced employees is essential, multimedia, such as videos, also can be vehicles for social learning and assessment of that learning, says Falana Thomas, trainer and instructional designer at Training Top 125 company PPD, a contract research organization. “We have thousands of hours of videos available on any soft skill you can imagine, in addition to subscription services such as Lynda.com, where employees can request access to take a particular training,” she says. “We also have active Toastmasters chapters at multiple offices where employees can practice their public communication skills.”

In addition, Thomas says not to overlook the usefulness of internal social media in facilitating observational and interactional learning. “The most common forms of social learning in companies are blogs, corporate wikis, and video. The use of podcasts also is increasing in popularity. You usually will see this branded as an internal university or learning center where available options are in one centralized location,” she says.

Rather than try to assess social learning directly, Thomas says

you can work in questions during an employee’s annual review that gauge how much he or she has learned by watching and interacting with peers. “The best way to track this during annual reviews would be to evaluate or discuss the employee’s growth on any skills that were enhanced, developed, or improved over time, but not on social learning itself,” she says. “What matters is that the employee improved skills with the assistance of social learning.”

The effectiveness of social learning also can be measured by how well the employee does in formalized training programs for which the social learning provided support. “Social learning is meant to supplement, not replace, formal learning programs. A good way to optimize social learning is to include references to other resources such as blogs, articles, videos, and tutorials, so the employee has a holistic view of the different options available,” Thomas says. “By participating in social learning, employees may find that formal learning is easier to complete because they have established a foundation of knowledge.”

## OPTIMIZE AND GAUGE SOCIAL LEARNING WITH OFFICE LAYOUT

Social learning is dependent on an employee’s interaction with others, so if you want to increase this kind of learning, and make it easier for others to measure how well a new employee has caught on, think about your office layout. “LaSalle Net-

work’s office specifically is an open-floor layout, with no cubicles, so employees can listen to and learn from people in and outside of their direct teams,” says Tom Gimbel, founder and CEO of the staffing and recruitment firm. “At LaSalle, new hires are required to listen to other project managers’ recruiting calls or sales calls, and then debrief after each. It’s how they are trained. We have new hires attend client meetings with tenured staff so they understand what a strong presentation looks and sounds like, and to better understand what is expected. Their job is to watch, listen, and observe, then ask follow-up questions about why things happened a certain way. The follow-up conversation is essential to their growth and development.”

The company even has employees rotate where they are sitting, so they can be exposed to different work styles, and learn from as many other employees as possible. “When new hires join the company, they are rotated among business units, so based on the employee’s and his or her co-workers’ experience, the best permanent place for the new staff member can be determined,” Gimbel explains. “New hires spend several months in each unit of the company, and at the end of the program, we work with the employee to determine what the best fit would be, and where he or she could make the most impact.” **T**

## ANALYZING SOCIAL LEARNING DATA

By Ian Huckabee, Co-Founder and CEO, Weejee Learning ([www.weejee.com](http://www.weejee.com))

Social media have allowed learners to evolve from passive media consumers to active contributors, and successful learning programs now include environments that take learners beyond passive absorption of content and turns them into pathfinders, curators, and co-creators (through collaboration) of the content they need.

These environments, together with preferred devices—computers, tablets, and smartphones—make up an organization’s new learning ecosystem, which gives learners access to an increasing array of learning interactions. These interactions, however formal or informal, now can be easily tracked through native analytics or through the use of behavior technologies such as the Experience API (xAPI).

The xAPI is a learning technology specification that collects data about the various experiences a person has online or offline. It’s a simple technology that can collect data from many technologies. SharePoint and WordPress data, for instance, can be collected from experiences users have online and reported back to the xAPI’s Learning Record Store (LRS). The LRS then can deliver reports and analytics on the kinds of informal learning interactions that until now, we’ve never been able to track.

Next-generation learning and talent management systems, such as Wisetail and Saba Cloud, and behavioral tracking technologies, such as Badgeville, provide their own flavors of tracking for social learning. Some tracking techniques include game mechanics such as points and badging, while others track likes, comments, and shares to determine the popularity and, through analytics, the effectiveness of a learning interaction.

While learning data by itself can give an indication of an organization’s competencies and skill sets, the learning industry is poised for a greater purpose for this new learning data: combining the data with business metrics to determine training’s effectiveness on the bottom line. Big data finally has reached the learning department, which will lead to cost savings in learning and better business results.