SWISSVBS

Designing for The Moment of Need

How to design a strategy to elevate your organization from learning to performance

By Josh Cardoz

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Abstract

The Moment of Need is any moment of learning need, whether in formal training or on-the-job. But how good are we at supporting learners when it matters most? This eBook explores the idea of the Moment of Need and offers practical strategies for making sure your L&D strategy not only caters to learning needs, but performance needs as well.

You'll learn about:

- The Moment of Need and why it is so important

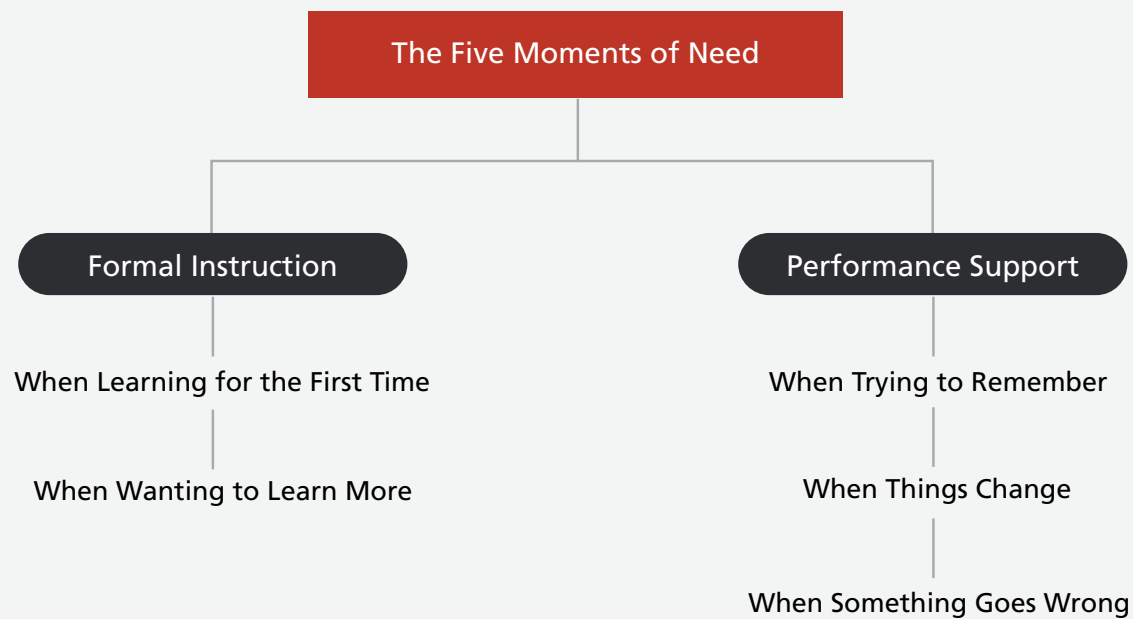- Best practices for optimizing your performance support strategy

What is the Moment of Need?

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The Moment of Need is a learning term that characterizes an instance of need for information, whether in a learning or performance context. Mosher and Gottfredson (2012) further developed the notion by articulating five moments of need in training and performance as an overarching framework for helping learners become and remain competent in their individual and collective work:

- **New**

  When learning how to do something for the first time.

- **More**

  When expanding the breadth and depth of what has been learned.

- **Apply**

  When needing to act upon what has been learned, which includes planning action, remembering or adapting performance to a unique situation.

- **Solve**

  When problems arise, things break or don't work the way they were intended.

- **Change**

  When needing to learn a new way of doing something, which requires changing skills that are deeply ingrained in performance practices.

The Five Moments of Need

Formal Instruction

When Learning for the First Time

When Wanting to Learn More

Performance Support

When Trying to Remember

When Things Change

When Something Goes Wrong

Source: Mosher & Gottfredson (2012)

When considering the frequency of each occurrence, moments of need occur much more frequently on the *performance* side of the spectrum than on the learning side. Yet, ironically, L&D is more optimized to support formal instruction than performance support. Why do we place so much emphasis on the learning side, only to leave the performance side to the learner's own devices? We need more learning when it matters, not just in low-stakes environments such as training sessions, where it is prone to disengagement and lost learning retention.

A lack of formal support for performance in the Moment of Need is a one of the biggest gaps in current L&D organizational structures.

Why Does It Matter?

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Why does it matter?

We often think that when training is over, the learning stops, but the Moment of Need is a considerable pain point in how we move from learning to doing, not only in terms of transfer of learning, but on-the-job impact. Supporting the Moment of Need matters now more than ever. Consider the following:

The facts

We need to know more

More than 80% of all companies rate their business "highly complex" or "complex" for employees. [1]

Learners are craving help

52% want learning at the point of need. [2]

The reality of the forgetting curve

90% of what we learn is typically forgotten within a week.

Failed transfer of learning

Fewer than 15% of people successfully apply what they learn. [3]

Learners have no time

40% of people say they don't have time to do the training they need. [4]

Executives can't find time

40% of executives say they don't have time to do the training they need.

A best practice amongst world-class organizations

More than 80% of all companies rate their business "highly complex" or "complex" for employees. [5]

51% of L&D within top-flight organizations have managers provide active support in the application of learning in the workflow (versus 10% from 'the rest'). [6]

69% of L&D within top-flight organizations have staff have access to job aids online or via mobile devices (versus 19% from 'the rest'). [7]

References

1   The Disruption of Digital Learning: Ten Things We Have Learned – Deloitte Human Capital Trends, 2014 and 2015
2   Profile of the modern learner—helpful facts and stats (infographic) – Elucidat. June 7, 2016
3   Bite Size Is the Right Size: How Microlearning Shrinks the Skills Gap – Whitepaper, Grovo.com
4   Bite Size Is the Right Size: How Microlearning Shrinks the Skills Gap – Whitepaper, Grovo.com
5, 6, 7   Driving the new learning organisation: the potential of L&D – CIPD - In-Focus 2017

The benefits of true performance support

World-class organizations are eight times as likely to use defined performance support practices than their counterparts. This is more than an informal attitude toward "helping" each other when the moment arises, but rather an explicit commitment to formal performance support (in terms of resources and/or technology), where help is always available at the Moment of Need and learners are aligned to the changing needs of an organization. Shifting toward a culture with a well-defined performance support strategy not only holds considerable benefits for learners, but will lead to seemingly instantaneous gains in ROI for an organization. Formal performance support will help:

- **Improve productivity**
  Learners spend less time seeking help, whether formally or amongst peers.

- **Improve performance**
  The right information at the right time helps optimize performance.

- **Enhance learning retention**
  More regular touch points with learners are scientifically proven to create more enduring learning.

- **Reduce training costs and time out of field**
  More time on performance support means less time on formal training/retraining and its ancillary costs.

- **Increase alignment**
  Consistency of messaging helps avoid misinformation in quickly changing organizational landscapes.

What can you do about it?

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Looking to optimize your performance support in the Moment of Need? Here are 8 key strategies to help you get there.

Understand the "UX" of the moment

To truly support learners in the Moment of Need, you need to understand the user experience (UX) of the Moment of Need. We know quite well how to do this in learning-first environments, but in a performance setting, it is radically different.
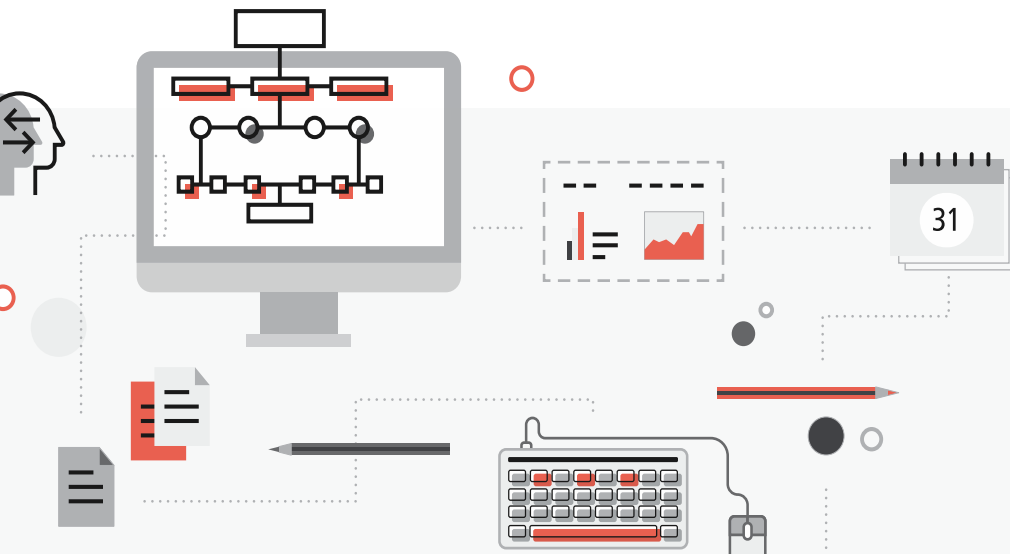
From a user's perspective, the UX of the Moment of Need is characterized by the following expectations:

- **Immediacy** - Whatever aid the learner is looking for, it needs to be highly accessible both in how they find it, and the format of the resource.

- **High stakes** - When the Moment of Need arises, it is likely because there is pressure driving it. Support in the Moment of Need should rise up to this challenge.

- **Tailored** - Specific needs require specific responses. Learners are looking for the answer to their specific request and nothing more.

- **Effective** - Bottom line: whatever you provide needs to solve their problem.

- **Intuitive** - The Moment of Need is a short window that closes quickly if it disrupts the learner's goals. Fulfilling the Moment of Need should be a highly intuitive experience that doesn't take away from the ultimate performance goal.

Understanding the Moment of Need through the eyes of your learner will help you better design the right experience.

Support Workflows

When it comes to performance support, learning should not stick out like a sore thumb. The idea of performance support is to enhance performance, not obstruct it, so it's important that whatever you provide doesn't *feel* like learning, but like information embedded in the learner's workflow.

Take the time to truly understand your learners. Learning needs and performance needs aren't always the same, so put yourself in your learner's shoes and try to experience the Moment of Need the way they do. It may help to develop learner personas that represent your target audience. By thinking through individual workflows for each persona, you'll get a better sense of the pace of the learning need, as well as what specifically learners would look for in *their* moments of need.
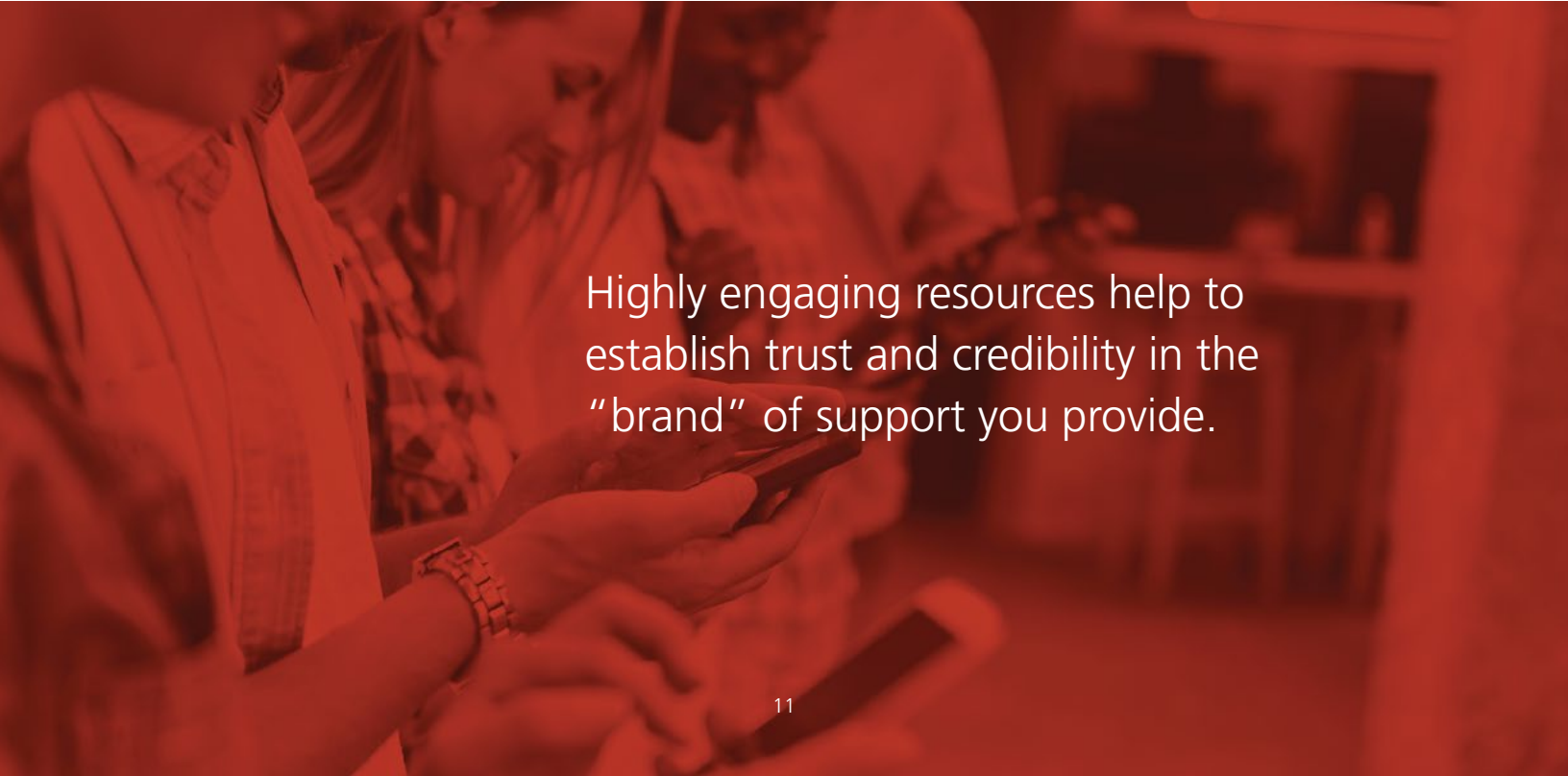
When thinking about workflows, also consider how far learners would have to deviate from their workflow to get help in their Moment of Need. If learners have to deviate from or obstruct their workflow, then performance support is not doing its intended job. Supporting workflows is not only about making it easier to get to content (avoiding deviation from the flow), but also having the content format easily approachable and consumable. It all needs to feel streamlined - that's true performance support at work.

Engagement is essential

While it's easy to think of engagement as fancy gloss to put over learning resources, in the Moment of Need, it is a must. Consider the following situation:

You are looking for a tutorial for baking cookies on YouTube. Two key search results come up: one of a person in their home kitchen, who looks like they are shooting a video for the first time (poor lighting and poorer video quality). The other shows fresh, beautiful-looking cookies out of the oven, with a chef presenting them with a step-by-step technique. Which would you trust? Unless you really relate to someone struggling with a camera, you'd likely choose the more professional looking one. Why? Because production value matters.

Highly engaging resources help to establish trust and credibility in the "brand" of support you provide. This is critical from an ROI perspective, as learners, after accessing a few resources, will start looking elsewhere for support in the Moment of Need if the resources do not make the cut. Make sure your resources are optimized for today's digital learner - who is accustomed to searches on Google and YouTube for their needs. High engagement is the starting point for optimizing support in the Moment of Need.
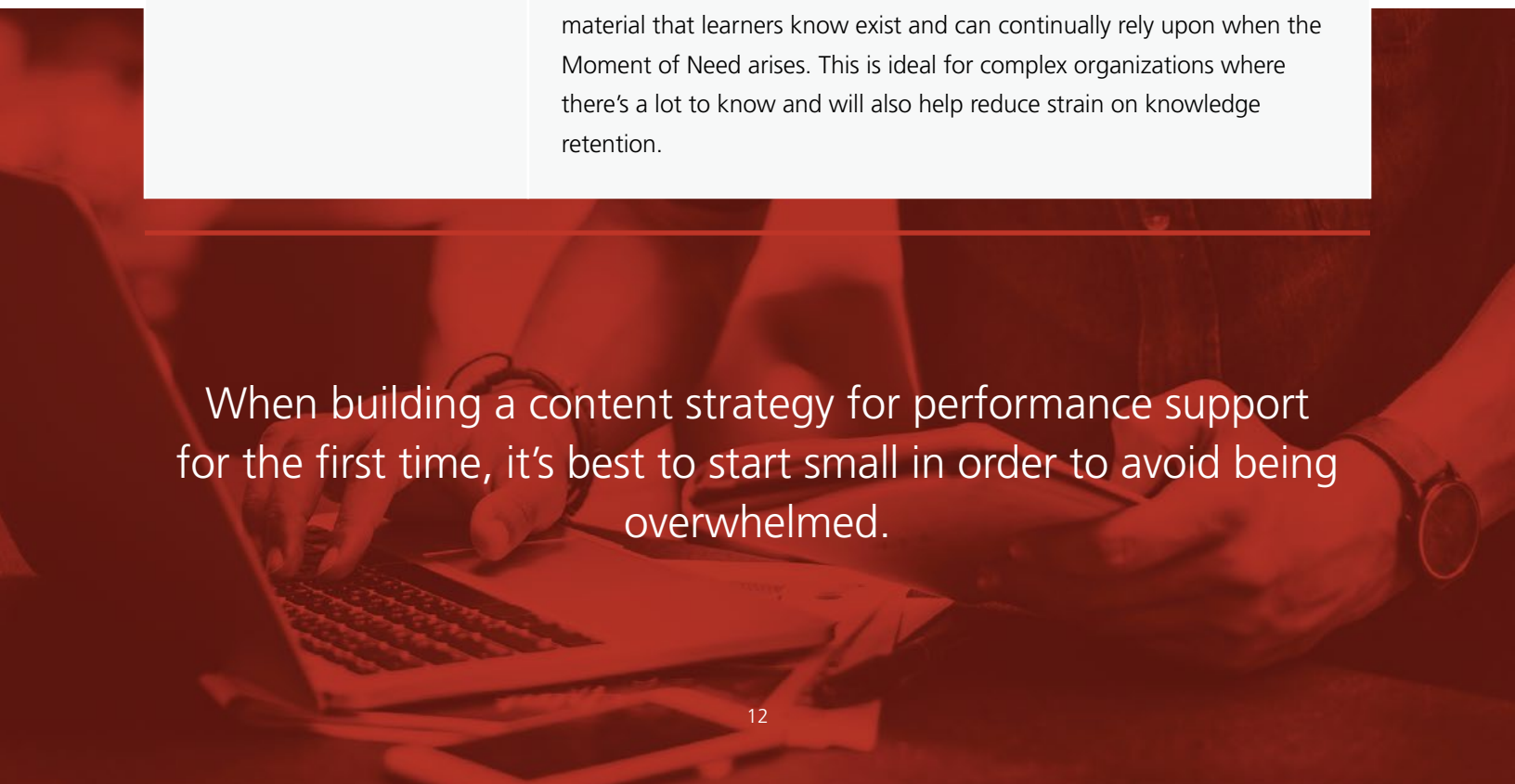
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New to performance support? Start with a theme

When building a content strategy for performance support for the first time, it's best to start small in order to avoid being overwhelmed. This will help you experiment so that you can learn more about what your learners are truly looking for. At first, it helps to start with a conceptual framework for the kinds of resources you want. Here are some examples of themes you can use to get started:

Theme	Description
Troubleshooting	Focused purely on providing answers to common problems/questions. Use your learning community to help you come up with topics they want addressed.
Before/After Key Interaction	No matter what your role, business unit or organization, there is bound to be a key interaction that requires support. Build a performance support ecosystem to support that interaction so that whether a learner is about to enter their sales call, retail transaction, installing a part or filling out a form, support is there to scaffold the interaction.
Reference	Designed for a "Search First" mentality, create a repository of reference material that learners know exist and can continually rely upon when the Moment of Need arises. This is ideal for complex organizations where there's a lot to know and will also help reduce strain on knowledge retention.

When building a content strategy for performance support for the first time, it's best to start small in order to avoid being overwhelmed.

Leverage Microlearning

One of the best ways to support the Moment of Need is with microlearning. Microlearning is the breaking down of essential knowledge into specific concepts and procedures. Each of these is represented by an individual and independent piece of content, typically a video or some other rich media format.

Key Benefits of Microlearning

High Impact

Microlearning focuses on high-impact messaging delivered in a short, punchy manner. This is an economical use of the learner's attention and time.

Accessible

Microlearning is designed for multi-device delivery, making it mobile friendly and even available in offline formats. Combined with the "pull-factor" of its design, microlearning is a very useful content format.

Flexible and Convenient

By virtue of being broken up into individual units, microlearning can be deployed in a variety of environments (e.g., individualized learning paths/workflows) and can even be reused based on context.
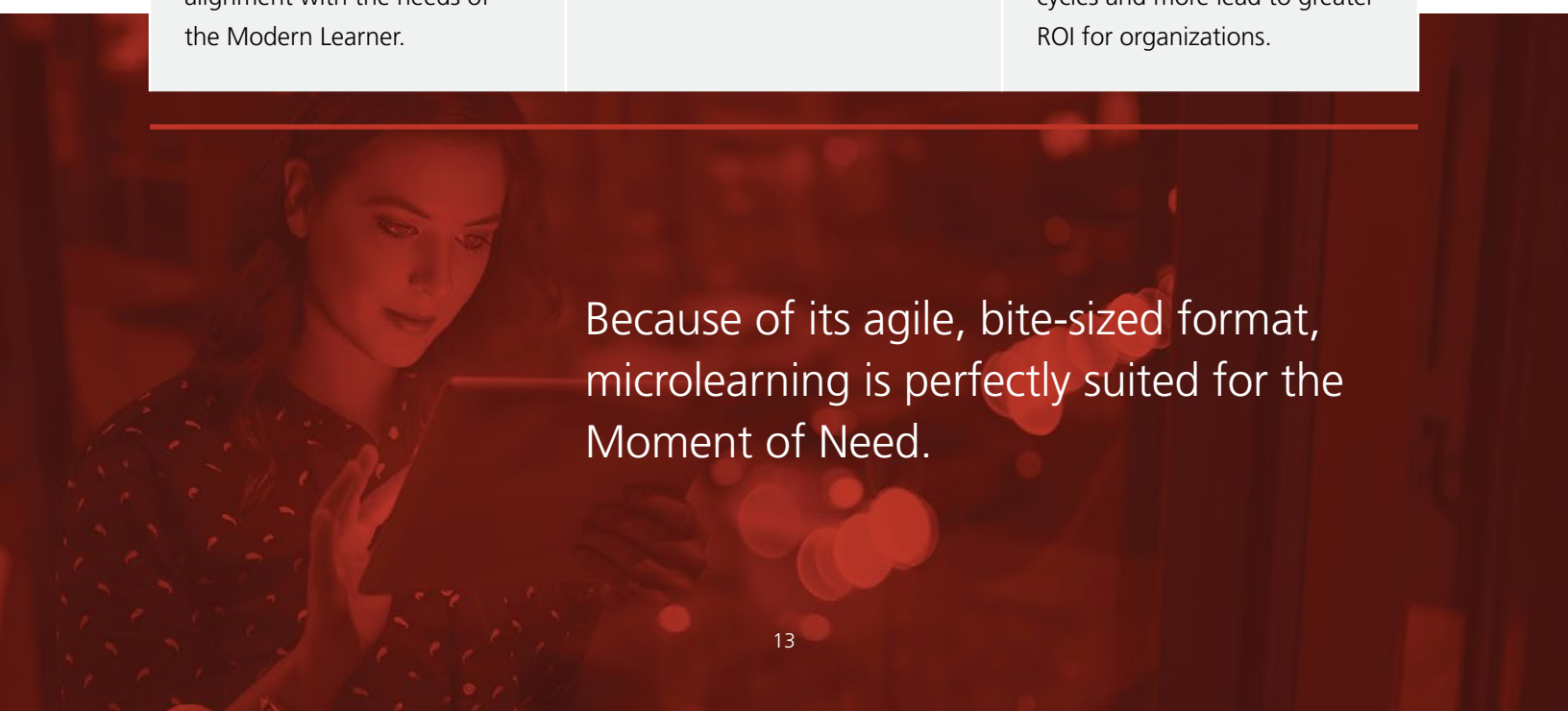
Engaging

Typically using a rich-media format, and in a length that is less time consuming, microlearning is in perfect alignment with the needs of the Modern Learner.

Just in Time

Designed for the Moment of Need, microlearning has a positive impact on learning application and behavior change.

Increased ROI

Due to the short nature of microlearning, the reduction of training time, shorter development, easy update cycles and more lead to greater ROI for organizations.

Because of its agile, bite-sized format, microlearning is perfectly suited for the Moment of Need.

Details Matter

The Moment of Need is a small window - one that is magnified by the learner's expectation out of what they want to get out of it. Under the magnifying glass, the details matter. When developing performance support content, pay attention to all the fine details to make sure you make the most out of the moment.

For example, the very title of your performance support resources matter. It needs to be engaging, practical and performance-focused. Avoid dry, monotonous training-first titles that will disengage learners from even wanting to access your resources. Here are few examples of how to create titles more optimized for a performance-first mindset.

Original Title	Revised Title
T-22A Form - (Video 3 of 7)	5 things to remember with the T-22A Form
Dealing with customer complaints	What happens when a customer says "no"?
yPhone Product Trailer - 2018	Talking about the new gPhone with customers

Finally, make sure your title is highly functional. The key topics of your resource should be clearly evident in your title so that it can be easily searchable. Remember: in the Moment of Need, the goal is immediacy, where learners are looking for something very specific. Let nothing distract from the immediacy of the moment - the high-stakes nature of what is trying to be resolved.

From the title, to the quality of the writing, to the visual element, to accessibility requirements, pay attention to the finer details of your learner experience. Overlooked details will stand out in this small window for learner support.

Invest in technology that supports immediacy

Maximizing the Moment of Need is all about timing - both in the sense that right content needs to be available at the right time, and that the time to reach that content is non-intrusive to the learner's workflow. This is where technology plays a key role. If you have compelling content, but it is nested ten levels down on an archaic LMS with limited search functionality, your learners will not care how good the content is.

As you plan your performance support strategy, make sure you invest in a technological infrastructure that can support the immediacy of the Moment of Need. Spending more time trying to find resources than actually consuming them is not going to work. This doesn't need to be a significant financial investment. Depending on your organizational needs, there are even options available that are free. The goal is to find technology that is intuitive, or if not, finding a "hack" to make it more intuitive.

Unsure of where to start? Ask your people which technology is easiest for them to use (whether inside or outside your organization). This is both a question of hardware (e.g., desktop, phone or tablet) and software (e.g., LMS, chat messenger or intranet site). The Moment of Need forces you to be acutely aware of an experience that is user-driven. If it doesn't make sense for the user, they won't use it.

Lastly, don't overthink it!

When developing the right strategy for performance support, it's easy to get caught up in the minutiae of the process. But sometimes, a preferred approach is to just get started, especially if your organization is doing little in terms of formal performance support.

Experiment with prototyping and collect meaningful data to help you understand which direction you want to go in, or at least, where to get started. Sometimes it's as simple as recording a 30-second video and putting it on a phone. If the need is clear enough and you create something valuable that addresses the need, it will have served its purpose. From there, your learners will take over and demand more. The end result: you will have built a further business case for more resources toward building a high-functioning performance support ecosystem.

Conclusion

Lack of formal support in the Moment of Need is one of the biggest gaps in how L&D currently supports organizations and their people. Providing formal performance support is not only a proven best practice amongst world-class organizations, but also yields significant learner benefits as well as positive ROI on organizational impact.

When trying to build and/or optimize your performance support strategy, start by answering some critical questions about your organization's current approach to performance support:

- How does L&D currently support performance needs? Where can it be improved?

- What is the "UX" of your learners' Moment of Need?

- How engaging are your current performance support resources? How long/short are they? Are they optimized for the Moment of Need?

- What technology do/can you use for increased accessibility to performance support needs? How many "clicks" does a user need to access necessary information?

- What data are you collecting to help inform and optimize the performance support you are providing?

With a well-crafted performance support strategy, your organization and its people will be put in a position to succeed at all times, allowing you to create better impact for both learning and performance.

Need help navigating through your microlearning strategy?

Get in touch with SwissVBS today.

About the author

Josh Cardoz is the Principal Learning Strategist at SwissVBS. Leading the Learning Experience Design Team, he has been a central figure in the design of several microlearning initiatives. He currently also teaches at the University of Toronto on "Online Learning Environments" and "Learning Experience Design."

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