

Position Paper

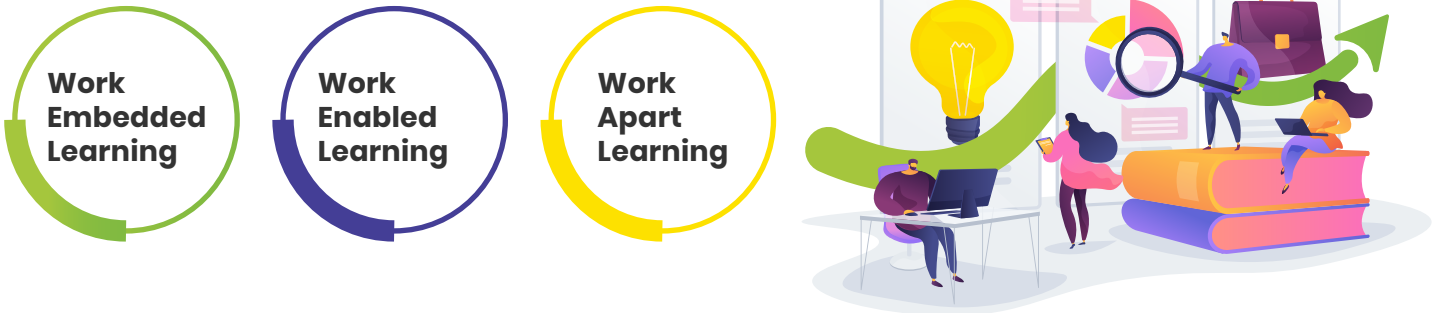
Workflow Learning

You likely have heard, of late, about 'workflow learning'. While it's not as new as the promoters would make you think (the late, great, Jay Cross was talking about it more than a decade ago), there is considerable interest. Is it justified?

Here, we explore the interpretation of workflow learning. We want to consider the definition, the rationale, and any problems. Ultimately, we want to end in a consolidated view.

What is it?

The term itself is arguably self-defining: learning in the flow of work. Many years ago, IBM touted three separate notions of learning and work:



The notion was that sometimes you needed to get away from work to learn before coming back. Other times, what you were working on could serve as a basis for learning. The most immediate one was learning while doing the work. That's synonymous with workflow learning. What this means is that while you're working, learning is layered onto what you're doing. IBM, in a patent proposal for "On demand learning", defined this last as

Work-embedded learning occurs on the job without interrupting the flow of work. Work-embedded learning uses the power of experience and execution with small responsive training modules embedded in the work process.

A critical element here is the statement that learning occurs without breaking workflow. This is the key to the promise.

Why is it important?

The obvious answer to why it's important is because it's become ubiquitous. The term is in use, and as such it should have a clear definition, value proposition, and implementation plan. Still, we want to go further and understand the critical proposed benefit.

The obvious key is that it occurs without interrupting the workflow. If we can learn while working, we have a significant advantage; the work can continue without interruption while our aggregate knowledge continues to advance. That's a true benefit.

One of the potential opportunities here is contextual learning. In traditional training, we take people away from work to learn, and (ideally) create artificial contexts in which to learn, such as labs, role-plays, and the like. Using the real context removes the necessity of creating the artificial learning environment, using the current situation as not just a performance environment, but also a learning environment. That's efficient as well as effective.

Why is it problematic?

One interesting phrase shows up later in that patent, that the work-embedded learning is “less successful at building deep comprehension because it does not inherently allow for the reflection that converts knowledge into understanding.” This is an important distinction. In our white paper on deeper learning, we’ve suggested that natural learning is action and reflection, suggesting that instruction then must be designed as action and guided reflection. Later on, the proposal realizes that this approach is “insufficient for transferal”. Given that our goals for learning should be retention over time and transfer to all appropriate and no inappropriate situations, this is problematic.

Learning science also suggests that this ‘help in the moment’ won’t even lead to retention. Overall, helping people in the moment is valuable, but it is unlikely to lead to learning, certainly not to the extent to support workflow learning as a viable learning mechanism. Is there something else?

We do have a clear identification for help in the moment that is valuable yet doesn’t have to lead to learning: performance support. Here, we’re talking about job aids like decision trees, lookup tables, procedural guides, and checklists. These are time-tested approaches that lead to better outcomes in performance. What they don’t do, deliberately, is lead to learning. They’re an alternative to the same.

Which is not to say that you couldn’t layer some learning on top of a performance support solution. However, for that to work would take reflection and time off-task. Yet, that’s not generally what’s touted as workflow learning. Note also that performance support design and learning experience design are separate. Each is valuable, but they’re different.

Our approach

We understand the need for new marketing initiatives. We also understand the appeal of buzzwords. However, we believe that for any concept to present true value, it has to be comprehended, be clear, and meet the above criteria. Unfortunately, the label itself, workflow learning, is misleading. If you do mean learning, you mean interfering with the workflow.

Yet, you can help people be more effective in the moment, not interrupting the workflow, but it’s not learning. You can also leverage the value of the current context for learning, but it can’t happen without interfering with the workflow. Both are valuable, different and need separate approaches. We get that.

To properly identify the need and opportunity, it helps to understand the nature of the work being performed: it’s duration, importance, frequency, complexity, and more. That’s the job of a good initial analysis. Once that analysis is done, the solution should match the circumstances. Whether it’s job aid or learning experience design, they each have specific processes for design, development, testing, and refinement. We appreciate both. We hope that you do, too. We’d welcome the opportunity to understand your circumstances, identify the right workflow solution, and develop it with you.