Timeline:
The Learning Trifecta

Activities: 3 ILT
5 Supportive Activities
1 Total Team Debrief
Time Commitment: 37 days + Debrief Time

In-Person Events

Day 7: ILT Session 1- Identifying Business Needs
Facilitator: Conduct Session
Participants: Participate in session (no remote attendance)
Managers: Participate in session (no remote attendance)
Sr. Director: Participate in session (no remote attendance)

Day 21: ILT Session 2 - Identifying Learner Needs
Facilitator: Conduct Session
Participants: Participate in session
Managers: Participate in session
Sr. Director: Participate in session

Day 35: ILT Session 3 – Crafting Effective Courses
Facilitator: Conduct Session
Participants: Participate in session
Managers: Participate in session
Sr. Director: Participate in session

Debrief – L&D Total Team
Managers & Sr. Directors:
Provide observations & feedback
Discuss next steps

Days 0 5 10 15 20 25 30 35 //

Digital Events

Day 0: Kick-Off with Terminology
Facilitator: Send invites to all 3 sessions + Do Sheet Terminology Activity
Participants: Complete Pre-work before ILT
Managers: Complete Pre-work before ILT
Sr. Director: Review Pre-work before ILT

Day 9: Activity - Identifying Business Needs
Facilitator: Send out activity
Participants: Complete activity
Managers: Schedule team time to complete; turn Do Sheets into Lucas
Sr. Director: Review Do Sheets and provide feedback to managers

Day 23: Activity - Identifying Learner Needs
Facilitator: Send Adult Learning Theory Activity and Learner Persona Activity
Participants: Complete activity, participate in chat
Managers: Schedule team time to discuss
Sr. Director: Monitor chat and provide feedback to managers

Day 37: Activity – Crafting Effective Courses
Facilitator: Send out Do Sheet Start-to-Finish Activity
Participants: Complete activity, Participate in chat
Managers: Schedule team time to complete
Sr. Director: Observe chat, prepare feedback

The Learning Trifecta

Facilitator's Guide

Introduction to the Scoping Process at Living Spaces

The scoping process at Living Spaces is a crucial phase of the course design process. In this phase, the Instructional Designer (ID) investigates a business problem and establishes the foundation for effective learning solutions. During this phase, the ID conducts research and works with stakeholders and Subject Matter Experts (SMEs) to identify:

- **Business Objective**: The specific measurable goal that the training solution aims to achieve. This objective is clearly defined as "The End Result" in our planning documents, often referred to as a "Do Sheet." The impact of achieving the Business Objective is described as "The Vision" in our planning documents, illustrating the positive outcomes when everyone performs their tasks correctly.
- **Action-Oriented Training Objectives**: The precise actions that learners need to perform on the job to meet the business objective. These objectives are detailed as "Do" statements and compiled into "The Do List" in our planning documents.

As IDs develop business needs, they rely on a planning documents collectively referred to as The Learning Trifecta:

- **Bill of Rights:** This document identifies core principles for delivering training that meets business and learner needs.
- **Learner Persona**: A detailed profile of the learner group who will participate in the course. This profile includes their capabilities, motivations, barriers to achieving the business objective, and their working environment. This information helps tailor a learner-centric instructional strategy and is integrated into the planning documents under sections like "The Gap," "Motivation," and "Obstacles."
- **Do Sheets:** This is a planning tool used by IDs to gather data and organizes the following elements into actionable statements that meet the business needs:
    - “The End Result” (business objective), “Do List” (training objectives) gathered during research.
    - “The Vision” and “The Gap” identify the stakeholder’s expectation for The End Result and why the business is not achieving it. These statements guide instructional design decisions.
    - The Bill of Rights and Learner Persona are parsed into statements throughout the tool, used to make learner-centric design decisions.
    - “Practice” identifies the activities to complete during the training.

About This Program

Course Format: This Program combines three instructor-led training (ILT) sessions and three spaced repetition activities. Our ID team members come to the session with prior knowledge of our scoping process, so this program aims to improve the proficiency and quality of the Do Sheets. With prior knowledge in mind, your role as Facilitator is to guide the participants towards sharing and practicing their skills.

Objective: The aim is to enhance proficiency in extracting meaningful business objectives and training objectives from a Subject Matter Expert (SME) discovery call.

ILT Format

The ILTs are segmented into 3 sessions following the flow of the Do Sheet. Each session is led by PowerPoints which provide the Facilitator with production instructions, discussion points, graphics, and audio.

- Facilitator support: the prompts from the PowerPoint deck are included in this guide verbatim.
- Learner support: all materials, including audio transcripts and worksheets, are provided in the Participant Materials packet.
- Learning Space:
  - A comfortable classroom environment with a whiteboard; if conducted online, a digital whiteboard
  - A PC and classroom-sized display
  - Speakers for audio portions

Foundational Activities

Two self-paced microlearning activities are utilized to equalize knowledge among new and experienced Instructional Designers:

- “Do Sheet Terminology” pairs a scenario with a completed Do Sheet. Each section of the Do Sheet is marked with a numbered label providing a brief description of the section’s purpose. For learners needing additional context, an audio discission of that section, including background, tips for instructional designers, and an explanation of the sample is provided. This activity is sent to learners to complete before attending ILT Session 1.
- “10 Minute Read: Adult Learning Theories” offers learners a brief video introducing Adult Learning Theory. An article follows, presenting 14 learning theories along with their use cases, strengths, and weaknesses. This activity is sent to learners to complete before attending ILT Session 3.

Spaced Repetition Activities

Two days after each ILT, the Facilitator will introduce follow-up activities for participants to complete either individually or as a team. These activities are largely driven by participants and their managers, with the Facilitator directing activities. Communication of activities will take place via Teams.

- Facilitator support: the communication cadence and prompts are included in this guide.
- Learner support: all materials, including audio and worksheets, are packaged into Rise courses published to Workday.
- Learning Space: Workday & Teams

ILT Session 1: Identifying Business Needs

- **Description**: This session utilizes 4 pre-recorded scenarios to lead participants through group and individual activities.
- **Time**: 4 hours
- **Classroom & Materials**
  - PowerPoint deck & display
  - White board
  - Printed participant materials
- **Preparation**
  - Reserve an appropriate meeting space.
  - Send invites to all participants.
  - Send materials for the Do Sheet Terminology activity; request each participant complete it before attending the first ILT session.
  - Print out materials for each participant.

Instructions: Follow the scripting in the deck slide-by-slide.

Slide 1: Welcome Slide

{Introduce Program} Today is the first in a series of three in-person sessions where we're going to improve the quality of our Do Sheets. The topics we'll be covering aren't new. In fact, they've been discussed quite a bit in our team, department meetings, and the workshop we had last year with Diane Elkins. What is new is the opportunity to tap into the shared knowledge and skills of our peers to create learning solutions that solve realistic business problems. Between each session we'll also have the opportunity to practice these skills back at our desks.

{Check for questions}

{Say this} I also want to mention that, because our goal is to improve our quality, the work we do in the session along with the work outside our desks is going to be evaluated. Our leadership team is looking for high performance in terms of how well we articulate The End Results, The Do List, The Vision and The Gap, The Learner Persona, and the Activities we present on our Do Sheets. So, you'll be receiving lots of feedback both in our in-person sessions and directly from your manager on your strengths and opportunities.

{Check for questions}

{Continue to next slide}

Slide 2: Session 1 Introduction

{Introduce Lesson} Today, the focus is on mastering 2 crucial parts of the Do Sheet: The End Result and the Do List. To get there, we have 4 mock interviews between an ID and a SME that we'll be crafting our Do Sheets around. We'll start off working as a group, completing Do Sheets together. As we move on, we'll work together in small teams and then as individuals.

{Present Participant Materials packet} All the materials you need for this course have been provided in the Participant Materials packet, including worksheets and a transcript for each of the mock interviews.

{Prompt for questions}

{Continue to next slide}

Slide 3: Scenario 1 (Citrus Sunshine Boost), Introduction & Audio

{Introduce Scenario 1} The scenario takes place at the fictional nursery, Full Sun Growers. They differentiate themselves from their competition, namely big box stores, through personalized service that drives higher sales. Our ID is Tyler, an Instructional Designer and our SME is Bianca, a brand manager. Bianca manages a sales enrichment program that relies on team members to suggest add-ons at the point-of-sale. Bianca and Tyler are meeting to discuss training to revive the sales of an add-on that's recently dipped in popularity.

{Check for understanding}

{Say this} The call will last about 4 minutes, covering many of the areas an ID relies on to complete the Do Sheet. For today, listen for The End Result and the Do List, taking notes as you go. You'll hear other discussions, such as issues with motivation or why sales have dipped, but today we're focusing on establishing clear End Results and Do Lists. When the call is complete, we'll work together to establish a strong End Result Statement and an actionable Do List.

{Check for understanding}

{Say this} Keep in mind some of the key lessons from last year's training with Diane Elkins. When listening for The End Result, focus on the measurable changes we want to see as a result of this training. For The Do List, listen for the specific actions team members need to perform to achieve The End Result.

{Check for understanding}

{Play recording then move to the next slide}

Scenario 1 Script – Citrus Sunshine Boost

[Tyler] Hi Bianca, it's great to see you. How was your weekend? Relaxing I

[Bianca] Anything but! It was my daughter's 8th birthday party – we held it at a roller rink and the kids absolutely loved it! How about you?

[Tyler] That sounds fun! I haven't been roller skating

in forever. I actually went hiking with my family. It was refreshing to be out in nature. And speaking of nature, I hear you need our help with our sales staff making more natural cross-sales pitches.

[Bianca] Too funny – nice segue Tyler. But yeah, we'd like some help recovering some lost sales.

[Tyler] I understand that we're here to talk about the Citrus Sunshine Boost. Could you start by giving me an overview of the current situation?

[Bianca] Citrus Sunshine Boost is our house branded citrus fertilizer. We sell it year long alongside our citrus trees. During peak citrus sales, we feature it at the point-of-sale as an add-on. It was doing well, but after our branding refresh last year, sales dropped significantly. We found that our employees weren't following the Sell More Grow More program effectively.

[Tyler] I see. Can you tell me more about Sell More Grow More?

[Bianca] Yep. It's a program designed to promote add-ons at the Point-of-Sale. Our team members are trained to show interest in the purchase, engage the customer with a question, such as what kind of fertilizer they use, then suggest an add-on. We usually have 3 to 4 items at the point of sale to offer, based on what's in the customer's cart and we rotate those products every few weeks to keep them fresh. The program is so important to our bottom line Tyler, it's what helps us compete with the big box stores. When our stores do well, sales from Sell More Grow More is what pays for employee benefits and funds bonuses.

[Tyler] I see. That's a huge deal. What do you think is causing the drop in adherence to the program?

[Bianca] Well, employees often forget to suggest add-ons, they don't see the benefit, or they need more practice in engaging with customers naturally.

[Tyler] Interesting. Can you elaborate on why employees might forget to suggest add-ons?

[Bianca] Sometimes they are just focused on completing the sale quickly and might overlook the opportunity to suggest an add-on.

[Tyler] That makes sense. Do you think they understand the benefits of suggesting add-ons?

[Bianca] We could do a better job here in explaining how they drive revenue. We try not to overwhelm them with back-office details so they might not fully see how they contribute to our success.

[Tyler] Got it. So, what specific business result are you aiming for with this training?

[Bianca] I'd like to see sales get back to where they were and then some.

[Tyler] Where were they before?

[Bianca] For the citrus fertilizer category they were at 18%. They've dropped to under 10.

[Tyler] OK. So you want to get back to 18%?

[Bianca] That'd be great.

[Tyler] And you mentioned surpassing those numbers?

[Bianca] Yeah. In the next 8 months I'm aiming for Citrus Sunshine Boost to represent 25% of our citrus fertilizer sales.

[Tyler] That's a clear goal. What do you think is the main barrier to achieving this?

[Bianca] Employees need to consistently follow the Sell More Grow More steps, but they seem to struggle with it.

[Tyler] Understood. Can you give me an example of how an employee might struggle with this?

[Bianca] They might not know how to naturally bring up the add-on or feel uncomfortable suggesting it.

[Tyler] Got it. Thanks for sharing that, Bianca. This gives me a good starting point. So it sounds like we're looking to refresh our training on how to utilize Sell More Grow More?

[Bianca] Exactly. We're expecting citrus sales to pick up in 8 weeks so this is a good time to refresh on the Sell More Program, featuring the talking points that will improve Citrus Sunshine sales.

[Tyler] Tell me a bit more about the Program.

[Bianca] Each day, when they open their register, team members need to check that the point of sale is neat and prominently displays the product. Then, as soon as they see a citrus tree in the customer's cart, I want them to identify it as a sales opportunity and engage the customer. For customers that show an interest, they pick up the product, show the product to the customer, and mention a benefit of a quality fertilizer. Then, ask for the sale.

[Tyler] Got it. This sounds like a slam dunk. Do we have any tip sheets that go over those benefits?

[End]

Slide 4: Scenario 1 (Citrus Sunshine Boost), Group Activity

{Check for questions}

{Lead conversation} Start with The End Result. Ask participants what they heard and work together to assemble a strong End Result statement that captures:

- Improvement in sales from 10% to 25% over 8 months.

{Transition to Do List} Ask participants to identify what the Do's are. As a group, refine the statements to start with a strong action word.

Examples:
- Prepare your workstation each day by neatly displaying add-on product.
- Examine each customer's cart for add-on sales opportunities.
- Engage customers with add-on sales opportunities in a discussion about their purchase.
- Share an add-on product and benefit with interested customers.
- Ask each interested customer for the sale.

{Debrief – Ask about challenges, tips, examples.}

Slide 5: Scenario 2 (Expense Reports), Introduction & Audio

{Introduce scenario 2} We're going to move on to Exercise 2. Similar to the first exercise, we'll listen to another mock SME call. Then, you will independently establish The End Result and create a Do List to present them to the group. I'll be here to get your ideas up on the board, but it will be up to the group to refine your ideas into strong End Results and Do statements.

{Prompt for questions}

{Say this} In our 2nd scenario, our ID, Tyler, is talking to Giselle, the accounting manager at Full Sun Growers. The accounting team needs help rolling out training to the sales team who has some issues with their sales reports.

{Check for understanding}

{Say this} The call is also about 4 minutes. As it plays, listen for The End Result and the Do List taking notes as you go on. Giselle is frustrated, so try to sift through her frustrations and focus on identifying the End Results and her needs for a strong Do List.

{Check for understanding}

{Say this} Just like in the prior call, keep Diane Elkins' lessons in mind. When listening for The End Result, listen for measurable changes we want to see as a result of this training. For The Do List, listen for the specific actions team members need to perform to achieve The End Result.

{Check for understanding}

{Play recording then move to the next slide}

Scenario 2 Script – Expense Reports

[Tyler] Hi Giselle, thanks for taking the time to meet with me today. How are you doing?

[Giselle] Busy, as always. Thanks for the call. We have a serious issue with the field sales team and their expense reports. They're submitting their expense reports late and with numerous errors. This is causing a significant strain on the accounting team. We need to address this immediately.

[Tyler] I see. What specific improvements are you looking for?

[Giselle] Ideally, I want expense reports submitted within 3 days of incurring an expense, but realistically, I'd be happy with 10 days after they return from a business trip.

[Tyler] Got it. So it sounds like an issue with timeliness.

[Giselle] Right. In terms of accuracy, I want 100%, but I'd settle for reducing send-backs to under 18%. Right now, it's between 30-40%.

[Tyler] That sounds like a reasonable goal. What are the main issues with the current submissions?

[Giselle] The reports are often late, filled with errors, and missing receipts. The sales reps know how to navigate the expense report system, but they need to understand the expectations and the importance of accuracy.

[Tyler] Understood - Can you give me some examples of the types of errors you're seeing?

[Giselle] Oh, where do I start? Incorrect amounts, missing dates,

expenses categorized incorrectly... It's a mess.

[Tyler] Is that unique to the sales team?

[Giselle] No, data entry is an issue with the whole company and they're easy to fix. The big problem is with receipts. It's a huge issue with sales. They know they need to submit receipts for any expense over $50, but it keeps happening.

[Tyler] That does sound frustrating. Do you think they understand the impact these errors have on the accounting team?

[Giselle] Honestly, I don't think they do. They probably see it as just another task to complete, without realizing the extra work it creates for us. We end up spending hours chasing down missing information and correcting mistakes.

[Tyler] I see. So, part of the training should focus on helping them understand the bigger picture and the impact of their actions?

[Giselle] Exactly. They need to know that their accuracy and timeliness directly affect our ability to close the books on time and manage the company's finances effectively.

[Tyler] Got it. What about motivation? Do you think there's a lack of motivation to complete these reports accurately and on time?

[Giselle] Possibly. They might see it as a low-priority task compared to their sales targets. But it's not just about motivation; it's about setting clear expectations and holding them accountable.

[Tyler] Understood - so we need to make sure the training emphasizes the importance of these reports and sets clear expectations for on-time submissions and accuracy.

[Giselle] Yes, and we need to be very clear about the consequences of not meeting these expectations. If they know there will be follow-up and accountability, they might take it more seriously.

[Tyler] That makes sense. Can you show me some examples of the errors you're dealing with?

[Giselle] Sure. Here's one from Terri. She submitted a $500 dinner with no receipt, a rental car receipt that's too crumpled to read, and about $150 in miscellaneous charges with no breakdown.

[Tyler] Wow, that's quite a mess. How do you handle situations like this?

[Giselle] We have to follow up with Terri, ask for the missing receipts, and sometimes even escalate it to her manager. It's time-consuming and frustrating. Here's one from a sales rep in Oregon. He submitted a picture of himself holding a piece of paper that says "I lost the receipt." It's ridiculous.

[Tyler] That's unbelievable. So, we need to make sure they understand the proper procedure for missing receipts, like completing an affidavit.

[Giselle] Exactly. that affidavit is absolutely required for missing receipts over $50. They need to follow the rules and submit the required documentation.

[Tyler] Got it. This gives me a clear picture of what we need to focus on. Is there anything else you'd like to add?

[Giselle] No, that's it. Thanks for listening Tyler, I know you'll get the message across. Just make sure they understand the importance of these actions and the impact on the accounting team.

[Tyler] Will do. Thanks for your time, Giselle. I'll get started on this right away.

[End]

Slide 6: Scenario 2 (Expense Reports), Individual Activity

{Check for questions}

{Lead conversation} Ask participants to work independently for 20 minutes to identify The End Result and The Do List before getting together in groups. Direct them to the paper script if they need to review portions of the call.

{Wait 18 minutes} Ask participants to wrap up in 2 minutes and then join their teams for the next part of the activity.

{Continue to next slide}

Slide 7: Scenario 2 (Expense Reports), Group Activity

{Wait 2 minutes} Ask the group to share their findings with their teams and work together on a unified End Result and Do List. They have 20 minutes.

{**Wait 18 minutes}** Ask the groups to wrap up in 2 minutes and designate a speaker who will share their results.

{Wait 2 minutes} Ask the groups to share their End Results and Do Lists out loud.

{Debrief – Ask about challenges, tips, examples.}

Slide 8: Scenario 3 (Garden of Excellence), Introduction & Audio

{Introduce scenario 3} We're going to continue with Tyler's next SME call, this time with Alex, a manager in Full Sun's contact center. Alex's team is dealing with some challenges with change management.

{Check for understanding}

{Say this} The call will last about 6 minutes, following the cadence of the prior 2 calls. Listen again for The End Result and the Do List taking notes as you go. When the call is complete, we'll move through the activity the same way we did in the prior call with Marie, the accounting manager. First, you'll work independently and then in your teams to establish The End Result and The Do Lists. For this scenario, we're going to expand the discussion a bit. As you listen to the scenario between Tyler and Alex, see if you can identify Alex's Vision and The Gap.

{Check for understanding}

{Say this} I'll repeat it once again so that we stay laser-focused on the task at hand: keep in our training with Diane Elkins. When listening for The End Result, listen for measurable changes we want to see as a result of this training. For The Do List, listen for the specific actions team members need to perform to achieve The End Result. For The Vision, listen for how Alex intends The End Result to impact the business. And for The Gap, listen for cues that explain the underlying reason Alex's department is experiencing an issue.

{Check for understanding}

{Play recording then continue to next slide}

Scenario 3 Script – Garden of Excellence

[Tyler] Alex - it's so good to see you. How are you and the little ones?

[Alex] Hi Tyler, things are good. Just busy with the kids. How's your family?

[Tyler] They're great. My twins are wrapping up 2nd grade and let me tell you, it's a tale of two cities. One can't wait to go, and the other is in it for recess. But uh, what's going on with the customer service team? I'm hearing great things and... well, some not so great.

[Alex] You heard right. We've been dealing with a lot of customer complaints lately, and it's taking a toll on the team.

[Tyler] They're really feeling the pressure. Can you give me an overview of the current situation?

[Alex] Sure. Our NPS for interactions in the contact center has dropped from 88 to 82 over the last year.

[Tyler] Ouch. What caused that 6 point drop?

[Alex] About 4 years ago we introduced "Garden of Excellence". It's a playbook of strategies for delighting customers, whether they're happy and excited, or whether they're frustrated or confused. When we join the model with motivated employees, our customers are happy no matter the outcome. Our supervisors were great at coaching to the playbook. For a long time, it worked great.

[Tyler] OK.

[Alex] But then earlier this year, we dropped metrics like handling time and quality assurance reviews. Instead, we encouraged team members to just focus on the customer. It became all about the NPS.

[Tyler] So the focus shifted to NPS, then the NPS fell?

[Alex] Exactly. Looking back, dropping those metrics was a leadership fail. NPS alone tells us the customer's impression of the call overall, but it doesn't tell us why the call was a success or not. Without quality reviews to coach to, our supervisors lost their strategy and our team members lost their motivation to perform.

[Tyler] Do we still follow the Garden of Excellence model?

[Alex] We do. Or we should. It's all become a bit fuzzy and I need to work with our supervisors to come up with a coaching strategy. Our biggest opportunity right now has to do with calls we call 'handoffs'.

[Tyler] Can you tell me what a handoff entails?

[Alex] Absolutely. When the contact center team answers basic questions like store hours or pricing, we call those Tier 1 questions. They're also trained to answer basic plant care questions about lawn maintenance, proper watering, and pest management. Those are what we call Tier 2 questions. When it gets to more complex questions, we hand the call off to our Tier 3 team.

[Tyler] Tier 3 – is that the retail team that helps out on the phones?

[Alex] You know it. Every store has experts with botany and agriculture experience. Ideally, they can take the handoff on-the-spot. If no one from the team is available, the contact center files a ticket and a Tier 3 team member gets back to the customer, either by phone or email.

[Tyler] Do we lose customer satisfaction because of the handoff?

[Alex] Actually, we don't. Generally, customers appreciate access to free advice. But when we miss the mark on the handoff, it all falls apart. My reps disengage once they discover the call is a handoff. Sometimes that means they stop asking questions and miss an opportunity to solve the question themselves. Other times, they just go cold. You can hear it in their voices.

[Tyler] Why do you think that happens?

[Alex] My team gets a mix of calls from easy questions to happy customers looking for advice. But a lot of callers are experiencing a customer service issue. My team handles those issues and it takes a toll. They get excited when a plant care question comes in because it's an opportunity to be helpful and share in a positive experience. So when they determine the call is a handoff, that excitement is deflated. They lose ownership of the call and forget to ask questions that our Tier 3 team might need. Questions like the age of a plant or the history of pests. Sometimes, they forget to get good contact details, or they convey inaccurate expectations about when the customer should hear back.

[Tyler] When should the caller hear back?

[Alex] That's when critical thinking comes in. If it's a relatively common question on a slow weekday, the customer might get a callback within 2 hours. If the call comes in over the weekend or we want to respond with a care video, the response might be by email sometime the next business day. Asking good questions and looking up the issue in our knowledge base is crucial to setting realistic expectations.

[Tyler] It sounds like you're looking for a course on managing the call and setting expectations?

[Alex] It's a bit more than that. We really want to get them more invested in the call and own it.

[Tyler] We need to focus on improving communication skills and problem-solving techniques. There's also an opportunity for empathy. Some customers spend their entire lives creating a beautiful outdoor space. A nice yard is an opportunity to express a lifestyle. A lawn under siege by grubs or an orange tree with bitter oranges can cause a lot of distress.

[Alex] I never thought about it like that. How do you fix bitter oranges?

[Tyler] Soil remediation. Orange trees thrive in nutrient-rich soil with good drainage. We have to be prepared with answers like this. It's why customers buy from Full Sun Growers over the big box stores. They need to know we're here for them and that we care. If you'd told one of my team members that you were experiencing bitter citrus, I'd expect them to express some concern, ask questions about the issue, and offer a good solution. Maybe explain that a specialist would be in contact and offer to email an article on soil quality in the meantime. That's essentially the Garden of Excellence model.

[Alex] That actually sounds like a solid response. I'd be a happy caller.

[Tyler] You probably would! It's all covered in the 'Garden of Excellence' model. That's how we got that 88 NPS. There's a few things I'd like to improve. How we empathize, the time they spend digging into the customer's needs, the ownership we take over each call.

[Alex] Those are some great goals. How do you measure things like the time our agents take with the customer or the ownership?

[Tyler] That's a good question, Tyler. We really don't. Not anymore. We live and die by the NPS score.

[Alex] If we were able to give you the best training possible, where would you like to see that NPS score?

[Tyler] 88 seems to be the sweet spot. Leadership would love to see it at 90 but there's always going to be a handful of customers that turn out to be detractors.

[Alex] OK.

[Tyler] I think 88 is a solid number to shoot for.

[Alex] Do you have a timeframe to get there?

[Tyler] That's tough. We need to show a turnaround right away. Like I need us to be at an 83 ASAP to show we're turning it around. I know it'll take a bit of practice so if we could get to 85 within a month and back to 88 in 10 weeks, I'd be happy.

[Alex] Yep, we can definitely work with that.

[End]

Slide 9: Scenario 3 (Garden of Excellence), Individual Activity

{Check for questions}

{Lead conversation} Ask participants to work independently for 20 minutes to identify The End Result, The Do List, The Vision, and The Gap, before assembling in groups. Direct them to the paper script if they need to review portions of the call.

{Wait 18 minutes} Ask participants to wrap up in 2 minutes then get together with their teams for the next part of the activity.

{Continue to next slide}

Slide 10: Scenario 3 (Garden of Excellence), Group Activity

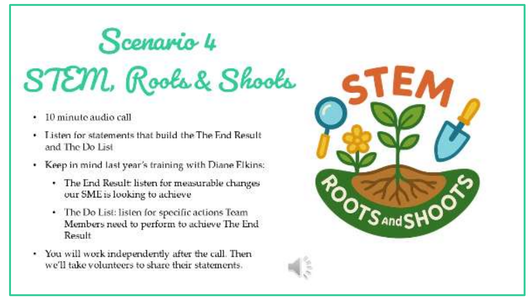
{Wait 2 minutes} Ask the group to share their findings with their teams and work together on a unified End Result, Do List, Vision, and Gap. They have 20 minutes.

{**Wait 18 minutes}** Ask the groups to wrap up in 2 minutes and designate a speaker who will share their results.

{Wait 2 minutes} Ask the groups to share their findings out loud.

{Debrief – Ask about challenges, tips, examples}

Slide 11: Scenario 4 (STEM, Roots, and Shoots), Introduction & Audio



{Introduce scenario 4} We're at our 4th and final call of today's session. The change here is that after the call, you won't work with your groups after the call. You'll have time to work independently on The End Result, Do List, The Vision, and The Gap. Then we'll take brave volunteers who are open to sharing with the group and receiving feedback.

{Prompt for questions}

{Say this} In this final call of the day, Tyler is interviewing Marie, a tenured employee at Full Sun Growers with a unique role conducting public outreach. Marie loves her work and can talk about it all day. So, her call is a bit longer at 10 minutes. This happens all the time in real interviews, especially when you have a relationship with the SME. When that happens, you'll want to stay cognizant of your ID role which is to identify business problems and solutions.

{Check for understanding}

{Say this} As always, keep our Elkins training in mind. listen for measurable changes and specific actions along with Marie's Vision and the underlying issues that led to the Gap.

{Check for understanding}

{Play recording}

Scenario 4 Script – STEM, Roots, & Shoots

[Tyler] Marie! It's been so long - how are you? I feel like I haven't seen you around the main office in ages! Where have you been hiding?

[Marie] Tyler, dear! So good to see your face. I'm still kicking around. You know, since my little Leo and Mia came along – my grandkids – well, priorities just do a little shift, don't they? Just last week, Leo lost his first tooth, and the Tooth Fairy, who bears a striking resemblance to me, apparently left glitter all over his pillow. The magic is real, Tyler!

[Tyler] That's so sweet, Marie. It sounds like a wonderful change of pace.

[Marie] It really is. Anyway, I decided the big District Manager chair wasn't quite where my heart was anymore. I needed more flexibility, more time for skinned knees and bedtime stories. So, I'm doing public outreach now. It's lovely, really. I get to lead demonstrations at the stores – things like how to properly prune roses, a lot of folks are scared of that one! Sometimes I chat with the students at the local colleges about careers in horticulture. But the best part: I pop by the elementary schools to try and inspire tomorrow's gardeners. It's a different pace, but a good one. How have you been keeping, Tyler? Still wrangling all those course designs?

[Tyler] I'm doing well, thanks, Marie! And yes, always a new design puzzle to solve. What you're doing now sounds absolutely wonderful. You're living the dream, it seems! And I heard through the grapevine that you might need my expertise for one of these fantastic programs for the kids?

[Marie] Oh, the grapevine is working overtime, isn't it? I'm genuinely thrilled to have your brain on this, Tyler. We've got this program, it's part of our push to connect with the community, especially around STEM – you know, Science, Technology, Engineering, and Mathematics.

[Tyler] STEM is awesome. I'd love to help.

[Marie] We call our little botany series 'STEM, Roots, and Shoots.'

[Tyler] That's brilliant! I love it. So, tell me more about what you're doing with it now.

[Marie] Well, it's a six-part series. Once a month, for six months, my assistant and I go into an Earth Science class. We do a demonstration, talk about plant biology, cell growth, photosynthesis – the whole shebang. The kids, bless their hearts, they get all wide-eyed and excited the first time or two we visit. New faces, something different from the usual routine, you know?

[Tyler] That's lovely to picture.

[Marie] It is. But Tyler, I've started to notice... after a while, some of them start to look a bit... well, like they're watching paint dry. Their eyes glaze over. And that's not what we want, is it? It's supposed to be exciting! I remember when my Leo first saw a Venus flytrap actually snap shut on a fly, his eyes nearly popped out of his head! We need more of that kind of wonder.

[Tyler] I can definitely see that.

[Marie] Kids want to be hands-on, get their fingers dirty, literally in this case!

[Tyler] It sounds like there's a lot of potential to make it more interactive.

[Marie] Exactly! And there's a bit more to the ask, here. This program sort of started as my baby, a passion project when I first transitioned into this role. It's grown wonderfully, like a well-tended perennial. But, as this outreach has gotten bigger, naturally, the folks upstairs – bless 'em, they have to watch the bottom line – they've started to look at it with an eye towards, shall we say, 'demonstrating value.' That's the polite way of saying, 'Marie, dear, how is this helping the company pay the bills?'

[Tyler] Ahh. So we're looking to monetize a bit on the goodwill.

[Marie] Precisely. It's not written down in any formal memo, but there's a certain... unspoken expectation. When we go into these schools, the hope is that they'll give us a little shout-out. You know, a mention in their PTA newsletters, or maybe a picture on their school's social media page – 'Look what Full Sun Growers is doing with our amazing students!' That sort of thing.

[Tyler] Right, getting that community visibility.

[Marie] Exactly. And those mentions, well, they tend to bring people into the stores. It's all connected, like the roots of a tree. Our leadership team is really looking at this as a way to build loyalty.

[Tyler] Got it. So, the ultimate goal here isn't just about amazing kid's programming. Are you looking primarily for a bump in that kind of publicity, or is the main driver to increase the actual engagement with the students?

[Marie] My heart is with the kids. Seeing their faces light up when they learn something new, that's my paycheck, emotionally speaking. But I've been with Full Sun long enough to know that my actual paycheck, the materials we use, and my fantastic assistant, Sarah – she's a gem, well it all has to come from somewhere. So yes, it's both about engagement and publicity. We need to show that the program is valuable, that it's doing good in a measurable way. And I truly believe that if we make these sessions more engaging, more hands-on for the children, the schools will naturally be more inclined to share what we're doing. Happy kids, happy teachers, happy principals... they talk! It's a win-win, I think.

[Tyler] There's absolutely nothing wrong with having multiple goals. In fact, it's pretty common. Knowing what we're aiming for, both in terms of student impact and business outcomes, helps me design something that truly meets your needs. So, I appreciate you sharing all that.

[Marie] Of course, dear. Transparency is key, isn't it? Just like with a good compost heap, you need to see all the layers! So, I suppose at some point I'll need to get you some concrete numbers to aim for, regarding those mentions and things.

[Tyler] For sure. Metrics will be important down the line.

[Marie] Exactly. But for now, let's just say the aim is a noticeable increase in our mentions on school social media and in their communications, and a significant boost in how involved the students are with the material itself. Does that sound like a starting point?

[Tyler] That's a perfect starting point. So let's dive into that student involvement piece. When you say 'engagement,' what does that look like ideally?

[Marie] Something tangible that shows the kids aren't just passively listening, but that they're processing it, connecting it to what they already know, and maybe even applying it.

[Tyler] Makes sense.

[Marie] I was thinking, you know, the scientific method is a big part of STEM. What if we had them doing more with that? My grandson, Leo, he's in third grade, and they're just starting on hypotheses. He came home the other day with a whole experiment planned for which of his toy cars goes fastest down the slide in their backyard. It was adorable, and he was so proud he'd figured out how to test it! Had a little notebook and everything.

[Tyler] That's a great idea! So, having them form a hypothesis about an experiment, for example? Something that shows them actively participating in the scientific process?

[Marie] Exactly! But then, Tyler, we hit one of our little snags. We're often on a tight schedule in the classrooms, you barely have time to say hello and goodbye sometimes. And, you know, liability.

[Tyler] It's always liability, isn't it?

[Marie] The paperwork alone! So, typically, my assistant or I end up doing the actual experiment, maybe with one or two students chosen to 'help' while the others just watch.

[Tyler] There's always a snag.

[Marie] Tell me about it! It's not ideal for widespread engagement. It's like inviting everyone to a birthday party but only letting one child take a whack at the pinata. So, yes, getting them all to write down or share a hypothesis about what they think will happen before we do the demo... that feels like a good step. Gets their brains whirring, at least.

[Tyler] Okay, so getting them to form and share hypotheses is one concrete idea. What else could we potentially shift from your demonstration to being more student-led or student-involved?

[Marie] Oh, I think there's quite a bit we could do there! For example, measurement! We're often tracking plant growth over a few weeks, or sometimes we do experiments around transpiration rates, or even looking at soil density and composition. It's fascinating stuff, really – did you know some plants actually prefer compacted soil?

[Tyler] Interesting! I didn't know that. So, how would they get involved in measurement?

[Marie] Well, instead of just us doing the measuring and telling them the results, we could involve them. Maybe in small groups, each with a little task? Or have them record the data in a shared document or a little science journal? We could even get creative with how they measure – non-standard units for the younger ones, perhaps like 'how many popsicle sticks tall is the sunflower today?' We just have to be mindful of the materials, some of our tools are a bit delicate, or, you know, pointy! Safety first, especially with the little ones. My Mia, the other day, tried to "help" me prune my prize-winning azaleas with her safety scissors... let's just say it was a learning experience for both of us, and the azaleas are looking a bit surprised.

[Tyler] That sounds promising, and very creative with the popsicle sticks! So, how many lessons are we talking about in total? You mentioned a 6-part series, but are there variations?

[Marie] Goodness, yes. The core is the 6-part 'Roots and Shoots' series, but over time, we've developed variations. So, it's probably closer to a dozen distinct lessons if you count the different iterations we have for the different grade levels.

[Tyler] A dozen lessons, okay.

[Marie] And we're currently reaching students from 4th grade all the way up to 9th. Each age group needs a slightly different approach, you know. You can't talk about mitochondrial respiration with a fourth grader the same way you do with a ninth grader, can you? And then there's the new challenge – one of the middle schools we partner with has gone fully online! So, we have to figure out how to make these hands-on concepts work through a computer screen. It's a bit like trying to teach someone to swim without letting them get in the water, or describe the scent of a rose to someone who's never smelled one, but we'll figure it out. We always do. Creative problem-solving, that's what gardeners are good at!

[Tyler] Wow, okay! So this is quite a comprehensive program you've built, covering a wide range of ages and now an online format too. It's a significant project to revamp all of that.

[Marie] Well, now, I don't want to scare you off, Tyler! It might sound like a mountain, but I'm hoping we can be clever about it, maybe find a nice path around the steepest parts. What I'm really envisioning is that we could develop a kind of... a framework? Or a template, maybe? You're so good with structure.

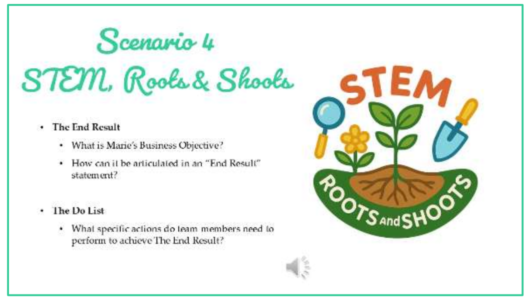
[Tyler] A framework or template could be very effective, yes.

[Marie] Something that establishes best practices for student involvement that we can then use as a guide to revise our existing lessons, and to build new ones. So, not necessarily redoing every single lesson from scratch with you, but creating a new way of doing things that my team and I can then apply. Does that make more sense?

[Tyler] Perfect sense. I think we have something special, Marie.

[End]

Slide 12: Scenario 4 (STEM, Roots, and Shoots) – Individual Activity



{Check for questions}

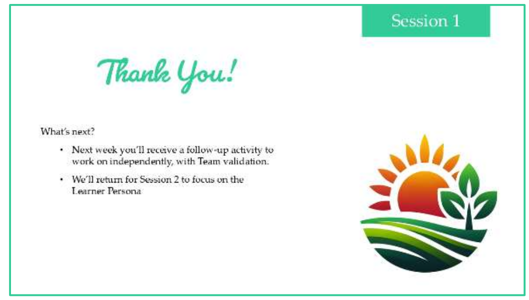
{Lead conversation} Ask individual contributors to work independently for 15 minutes to identify The End Result and The Do List along with The Vision and The Gap. Ask the leadership team to use this time to take notes on their observations, group strengths, and opportunities.

{Wait 13 minutes} Ask participants to wrap up in 2 minutes.

{Wait 2 minutes} Ask for volunteers to share their work. Go around the room and encourage feedback from individual contributors. Ask our leaders to make notes about feedback on the results of this activity, hold off until the end.

{Continue for 15 minutes. Seek new volunteers if needed to fill the time}

Slide 13: Session 1 Debrief - Expectations



{Say this} We covered a lot of ground today. I hope today's session was helpful, both in applying what you know to the Do Sheets and in building your confidence to know what you're doing well and when to ask for help.

{Pause briefly} I know these kinds of activities where we have to think quick and share as a group takes a lot of energy, so I want to thank you for participating and for sharing your insights with your peers.

We're going to continue our skill development through a series of in-person sessions and independent activities. Altogether, we're going to have 3 group sessions like this, each building on the prior sessions. After that, we'll have a debrief at our L&D Total Team meeting to discuss what we've learned as a group and which skills our leadership team would like us to work on. Between each of these sessions, you'll receive a follow-up activity to sharpen your skills.

{Check for questions}

{Continue to next slide}

Slide 14: Session 1 Debrief - Feedback

{Say this} In the last few minutes, I'd like to turn the floor over to Lucas and our managers for their observations on what went well and where they see opportunities.

Follow-up Activity 1: Identifying Business Needs

- **Description**: This team activity supplements ILT Session 1.
- **Time**: Self-paced
- **Classroom & Materials**
    - All materials are available through a Workday Rise Course: (link goes here)
- **Preparation**
    - Initiate activity 2 days after ILT 1 occurs.
- **Instructions – Manager Communication**
    - Create a Teams Chat titled, "Trifecta Activity: Manager Chat"
    - Add all managers to the chat.
    - Send the following message:

Good morning! I am about to send out the follow-up activity for last week's ILT to the team. in a separate chat titled, "Trifecta Activity: Identifying Business Needs". The materials and instructions can be found in a Rise course published to Workday: (link goes here).

The activity will ask them to listen to a new scenario, "Garden Guardians." Please meet as a team to complete Page 1 of a Do Sheet together, including "The Vision" and "The Gap". Once completed, please turn the group's Do Sheet into Lucas.

- **Instructions – Participant Communication**
    - Create a Teams Chat titled, "Trifecta Activity: Identifying Business Needs"
    - Add all participants to the Chat Add all participants to the Chat.
    - Send the following message:

Good morning, everyone! We have a follow-up activity for last week's workshop on The Learning Trifecta.

Please follow this link (link goes here) to access the activity through Workday. Your manager will schedule time to complete the activity as a team – please be sure to listen to the recording in Workday before then.

ILT Session 2 – Identifying Learner Needs

- **Description**: This session utilizes the pre-recorded scenario introduced in Follow-up Activity 1 to lead participants through group and individual activities.
- **Time**: 2.5 hours
- **Classroom & Materials**
  - PowerPoint deck & display
  - White board
  - Printed participant materials
- **Preparation**
  - Reserve an appropriate meeting space.
  - Reserve rooms (one space for each team) for the Break Out Activity
  - Send invites to all participants.
  - Print out materials for each participant.

Instructions: Follow the scripting in the deck slide-by-slide.

Slide 15: Session 2 Welcome

{Welcome participants back}

{Say this} Welcome back to our second workshop on The Learning Trifecta. In our last session, we started with establishing what the business needs out of training. Working together, and then independently, we pulled out The End Result which is another way of articulating a solution to business problem, one where our solution produces a measurable result where our stakeholders can see an increase or a decrease in a key metric that impacts their business. We also established Do Lists which are the actions our stakeholders' team members need to take to produce that impact.

{Check for questions}

{Continue to next slide}

Slide 16: Session 2 Introduction

{Say this} Now that have a solid understanding of what the business needs, we're going to balance that equation by assessing what our learners need by completing a Learner Persona.

{Prompt participants} Why is it important that we invest time into understanding our learners?

- Create training with impact by meeting the learners' needs
- Improve engagement by making material more relevant to the audience you're delivering to
- Improve knowledge retention by considering the learner's motivations, obstacles
- Improve the training ROI by preparing the learners to carry out the Do List on ways they can relate to

{Possible prompt} Does anyone have an example of a learning solution you've encountered that was really tuned to what you needed? It could be one you've taken as a learner; one you had a hand in producing or just one you observed?

{Say this} We have a good understanding of why it's important to tailor our learning solutions to our learners. This is important for our IDs because we need to scaffold our course design around what our learners need and what we can give them to make learning easier or even how we assess whether learning happened. But it's not just IDs. For our LXDs, we might need more time with graphical elements and navigation cues for audiences with technology limitations. For our Facilitators and Producers, knowing our learners' needs can impact things like timing or how we make modifications to delivery to make sure everyone is impacted by a session. There's even an implication in how we go about collecting data, making we're asking questions in a way that are accessible and meaningful to our learners. So understanding our learners is a big job.

{Prompt for questions}

{Say this} Today, we're going to continue working with a recorded scenario based at the fictional Full Sun Growers. We only have one call today, which will prompt some group work. Then, we're going to put a pause around the recorded scenario and work together in our Teams to talk about the needs your team primarily serves.
{Prompt for questions}

Slide 17: Exercise 5 (Garden Guardians), Audio

{Re-introduce scenario 5} Between our in-person sessions, you were sent the 5th scenario to listen to and react to independently, then as a group. As a quick reminder, that scenario was an interview between Tyler, an Instructional Designer at Full Sun Growers, and Erin, a manager at one of their four Distribution Centers. In that scenario, Erin was about to roll out cost saving measures to the other centers and she needed Tyler's help with the training.

{Check for recall}

{Say this} For this activity, we're going to pivot away from The End Result and Do List and towards the learners. Let's listen to the call again, it's about 8 minutes. For this call, Erin has some good insight into who her team members are and what they need. Listen for those cues and make notes about those insights. Then, asking yourself how you might make your learning more impactful Erin's group.

{Check for understanding}

{Say this} Keep in mind that we aren't moving away from the Do List or The End Result, we're identifying how we can help Erin's team members excel at the Do List so that they achieve The End Result in a way that's relevant to them.

{Check for understanding}

{Play recording then continue to next slide}

Scenario 5 Script – Garden Guardians

[Tyler] Erin! It's great to see you. How have things been at the distribution center?

[Erin] Hi Tyler! Things have been busy but good. We've been working hard on our Six Sigma project to reduce costs from patio furniture damage.

[Tyler] Ohh! High stakes! Doesn’t patio furniture deliver huge profits?

[Erin] Yes! It has the biggest margin of any category we sell. And it’s going even better with the improvements we’ve made at my warehouse. We piloted a program to reduce costs associated with damage. We've seen significant improvements, so the program is being rolled out to our all 4 distribution centers. You know Full Sun loves to give everything a fun name so we’re calling this program The Garden Guardians.

[Tyler] Hah! That’s catchy. I’m already loving it. Tell me more.

[Erin] Sure. On average, 35% of the furniture we order has damage that makes it unsellable.

[Tyler] Whoa! Over a third. What do we do with it all?

[Erin] That depends. If it’s received with damage, it never makes it off the dock. The vendor has to take care of it and usually that means it gets sent off to a liquidator.

[Tyler] Sounds good. So it becomes their problem.

[Erin] Yes, but it’s our problem too. There’s administrative costs associated with reporting the damage, labor costs to unload and temporarily store it, and an impact of insufficient inventory. This Spring we had a shipment of 8 teak Serenity Garden benches and all but 1 had splits in the wood. The distributor took them off our hands, but it was going to take 9 weeks to get replacements. It didn’t make any sense keeping the samples in our stores, so we took a loss and sold off the samples.

[Tyler] I never thought about that ripple effect.

[Erin] Sometimes it’s damaged upon receipt, so furniture was damaged either when it arrived or sometime between delivery to the warehouse and delivery at the customer's home. We've managed to reduce that significantly with our new guidelines.

[Tyler] Wow, that's a big improvement. What contributes to that high rate of damage?

[Erin] There were several factors. Poor handling practices, inadequate packaging, and lack of training were major contributors. We realized we needed a comprehensive approach to address these issues.

[Tyler] So, what changes did you implement?

[Erin] Our first big win was working with vendors on packaging materials. Adding about $3 to $5 in cardboard gave the boxes the added rigidity our boxes needed. We tagged in a packaging consultant, and it was pricey, but they helped our vendors ship in boxes that were reinforced in just the right spots. Three to five dollars in cardboard eliminated 60% of the damage sustained in shipping. Best of all, the vendors absorbed that cost!

[Tyler] Sweet! Do you think there's any training around that? It sounds like it's the responsibility of the vendor to package the product sufficiently.

[Erin] You're right, it is the vendor's responsibility. Typically, they do a good job but sometimes they miss the mark. The stakes are high on this merchandise, so The Garden Guardians program requires our inbound distribution center teams to do a spot check on packages over 30 kilograms. If there's an expectation, they report it to a supervisor.

[Tyler] Good call. What else are you doing to reduce damage?

[Erin] The next change we made was a simple designation that tells our distribution center staff who is authorized to move what merchandise. We have Lift Operators who have a designation of Lift 1, 2, or 3. After their initial training, new and seasonal Lift Operators start at a 1. After a certain number of accident-free hours behind the lift, they can certify for a promotion to Lift 2. And again, to Lift 3. Boxes with significant value carry a label with a 2 or a 3 to indicate who is authorized to move them.

[Tyler] Ahh. I'm guessing a Lift Operator 3 can move a box marked 2 or marked 3. But a Lift Operator 2 can only move a box marked 2?

[Erin] You got it. Right now, it's up to the Inbound supervisors to label the boxes when they come in. When we roll out the Guardians program to the other distribution centers, they need to recognize which products get which labels.

[Tyler] Who else needs to know the significance of the labels?

[Erin] This is tricky. There's a lot of work for our planners here. They use software to map out who picks what, but the software isn't set up yet to identify which products get a 2 or 3 designation. That upgrade is coming next year. So, for now, they need to manually check the assignment lists. For Phoenix and my center in Fontana, it's easy. Furniture is always stored in aisles 19 through 25. For Elk Grove and Aurora, they're not as organized and their planners really need to know their products.

[Tyler] That's a lot of responsibility. Do you have SOPs to help them?

[Erin] We do and it's working out well here in Fontana. The labels themselves act as a failsafe. The lift operators here know they are never to grab a package labeled with a number that exceeds their own designation. We made it easy, so no matter the language the lift operator is fluent in, the number on the package is a clear indicator of what they are allowed to pick. It's a bit of a culture shift, but we need to train our Lift Operators how to communicate with their supervisor if the label exceeds their designation and we need to train our supervisors to accept that pushback without exception.

[Tyler] That's a big shift. Do you have buy-in from everyone?

[Erin] We do. Damaged merchandise impacts the District Managers who oversee our distribution centers more than anyone. So they've been asking for this for a long time and are fully on board. The good news is we have some incentives coming. Each month, distribution centers who meet their damage goals get an incentive – anywhere from a party to a bonus depending where they land. So that's a great win for employees who get on board with the Guardians program.

[Tyler] Great! I feel like there's something to be said for employees who don't follow the program?

[Erin] This is pending HR review, so I'd ask you to keep it under wraps. But there's a disciplinary program for lift operators and supervisors who deviate from the program. Anywhere from exclusion from that month's bonus to termination. We can talk about the incentives in this training, but HR will cascade the other side.

[Tyler] OK. And you mentioned language considerations. Is that something we'll want to build into the training?

[Erin] Absolutely. After you put together a training package, my team is out to each center to train the supervisors and managers. That group has sufficient English language skills to attend that training so the scripting can be created in English. From there, we need to be creative.

Our frontline staff speaks a combination of English, Spanish, Korean, and Vietnamese.

[Tyler] That's a good thing to know. Is there anything that we need to produce in another language?

[Erin] There is. We're going to want printed materials like posters in the work areas and a revised sticker on each of the forklifts. For those materials, we want to lean on graphics whenever possible to convey a meaningful message. When text is critical, it will need to be in all 4 languages.

[Tyler] Got it. Is there anything else we should consider with this audience?

[Erin] Well, yes. And I don't want to sound critical, but we'll really want to be mindful about delivery. L&D has provided us great eLearning courses before and that probably went over great in corporate and our retail centers. This is an energetic group. Our best employees are used to having their productivity tracked so they come in ready to stay in motion. They have a finite tolerance for classroom time, so we want to keep the training short, with one topic a day. We're talking 5-7 minute bursts during their daily safety meeting before we lose them.

[Tyler] Good point! And I appreciate the feedback. Other than keeping the lessons short, do you have any other tips on what works well for this group?

[Erin] Absolutely. We mentioned the perks of the Guardians program so that should be weaved into your lessons. We also want to make sure the group understands that what they do matters so that they come in with a sense of pride. We could do a better job of explaining why they're here and what their work does for the customer and the company.

[Tyler] That's a slam dunk. Helping them link the importance of cartons marked with a 2 or 3 with what's inside would be huge.

[Erin] Yeah! I love that. The third thing is that this group needs to experience a new task hands on. This is probably where classroom-based courses fail. I need them up on their feet, putting labels on merchandise and identifying boxes with a 2 or 3 label. That kind of activity gets the gears turning.

[Tyler] This is great insight Erin. I think I'll have fun with this course. I can't wait to see how the program unfolds.

[End]

Slide 18: Scenario 5 (Garden Guardians), Group Activity

{Say this} Erin had some great insight into who her team members are and what she needs them to do. Not all SME's are as dialed in to their teams, so we'll talk about that later. For now, I'd like us to answer a few questions as a group. Since this is a supply chain topic, the exercise is closest to Joey's team. But as you're answering, keep in the back of your mind what changes you'd make if you were rolling out the same learning solution to the departments your team works with.

{Check for understanding}

{Prompt participants} The question is about Erin's audience. I heard her mention a couple audiences she needs the training to speak to. Who *is* Erin's audience for this learning solution?

{**Lead Discussion}** Look for these key groups:

- Managers/Supervisors at other DCs
- Individual Contributors at other DCs

{Continue to next slide}

Slide 19, Scenario 5 (Garden Guardians), Group Activity

Prompt participants} What did mention as motivators for this audience?

{**Lead Discussion}** Look for these key points:

- Pride in their work
- Linking their value to the company's success & customer

{Continue to next slide}

Slide 20, Scenario 5 (Garden Guardians), Group Activity

{Prompt participants} What did we hear that speaks to how her team learns best?

{**Lead Discussion}** Look for these key points:

- Short, daily courses
- Activity
- In-person training over
- Language consideration

{Continue to next slide}

Slide 21, Scenario 5 (Garden Guardians), Group Activity

{Lead Discussion} If you were Tyler, what might you do to meet the needs of the audience while getting them to satisfy Erin's End Result?

{This is a subjective discussion}

- Specific engagement activities
- Considerations for time, technology, learning environment.
- Considerations for learning capacity, prior knowledge
- Considerations for motivations & barriers

{Continue to next slide}

Slide 22, Scenario 5 (Garden Guardians), Group Activity

{Lead Discussion} It's possible that we could train other departments on Erin's Six Sigma rollouts. How would we change the training if this were delivered to Guest Services? How about a broad audience like an onboarding course?

{This is a subjective discussion}

{Continue to next slide}

Slide 23, Scenario 5 (Garden Guardians), Group Activity

{Lead Discussion} Our final question goes back to your ownership of the process and the strategy to employ as IDs when scoping out a new project. In this scenario, Erin really knew her people. But not all SMEs are in touch with the needs of their employees. What are some ways we can get that information if the SME gives you a generalized view of their team members or if they signal that they don't know.

{This is a subjective discussion}

{Continue to next slide}

Slide 24, Scenario 5 (Garden Guardians), Break Out Activity

{Preparation: Prior to session, have workspaces for each work group ready-to-go}

{Say This} For the next activity, we'll break out into small groups based on your teams. We're going to do this because I'd like to see what considerations you make in your learning solutions for the departments you work with. For some of us, we're already doing this whether we know it or not. For others, this is a good opportunity to work as a group to identify how you can customize your learning solutions based on the persona of your learners.

{Check for questions} Before I hand out the instructions, are there any questions?

{Provide instructions} For this activity, you'll have 45 minutes to work together in small groups. I'd like you to pick one department that your team provides training solutions to. Then, identify 3 needs unique to that audience. The first is how they like to learn. The second is what motivates them. The third is a barrier that exists to learning – there's a long list of things that can make learning difficult, you can pick anything that's important to the group you've identified.

{Check for questions}

[Continue with instructions} There's more that goes into a learner persona than these 3 things, but this will give you a good start into thinking from your learner's perspective. Once you have these 3 needs identified, brainstorm as a group one to two strategies you can employ that make learning easy to learn and easy to practice. When we come back in 45 minutes, one person can present to the group.

{Check for questions}

{Break out the groups to their workspaces}

Slide 25, Scenario 5 (Garden Guardians), Group Activity

{Welcome participants back} We're back for our group presentations and I'm eager to see what you've come up with. Let's get started with our first volunteer group – please present who your audience is, what needs your group identified for that audience, and how you can make learning easy to learn and easy to practice.

{Hand over to first group and moderate the conversation}

Slide 26: Session 2 Debrief - Expectations

{Say this} We covered a lot of ground today. I hope today's session was helpful, both in applying what you know to the Learner Persona and in using that persona to shape your courses.

{Pause briefly} I know these kinds of activities take energy and quick thinking, so I want to thank you for participating and for sharing your insights with your peers.

{Pause for any feedback] We're going to continue our skill development through a series of in person sessions and independent activities. We have two more follow-up activity that you'll work on independently which you'll finalize in your teams. The first activity is a microlearning course on Adult Learning Theory. In the second activity, you work independently then follow-up with your teams for validation. Then we will have one more in-person session to discuss how to complete Page 3 of the Do Sheets followed by one final follow-up activity. After that, we'll have a debrief at our L&D Total Team meeting to discuss what we've learned as a group and which skills our leadership team would like us to work on.

{Check for questions}

Slide 27: Session 1 Debrief - Feedback

{Say this} With the last few minutes, I want to turn the floor over to Lucas and our managers. First, a few words on what types of things you steer away from when identifying who your learners are. Then, we'll get some feedback on the team's observations in terms of what went well and should be repeated, and where our opportunities are as we move forward.

Follow-up Activity 2

“Trifecta Activity: The Learner Persona”

- **Description**: This team activity supplements ILT Session 2.
- **Time**: Self-paced
- **Classroom & Materials**
    - All materials are available through a Workday Rise Course: (link goes here)
- **Preparation**
    - Initiate activity 2 days after ILT 2 occurs
- **Instructions – Manager Communication**
    - Send the following message in the Teams Chat, “Trifecta Activity: Manager Chat”:

Good morning! I am about to send out the follow-up activity for last week’s ILT to the team in a separate chat titled, “Trifecta Activity: The Learner Persona”. The materials and instructions can be found in a Rise course published to Workday: (link goes here).

The activity will ask your Team members to identify a previously implemented eLearning course targeted at the departments your team currently designs for. Please schedule time as a team to discuss how those courses could be modified to better meet the needs of the audience.

Once completed, select one person to post a link to the course you selected to the Teams Chat titled “Trifecta Activity: The Learner Persona” along with a list of changes your team would make to the course.

Please encourage your team members to participate in the chat and provide feedback to their peers in the chat.

- **Instructions – Participant Communication**
  - Create another Teams Chat titled, "Trifecta Activity: The Learner Persona"
  - Add all participants to the Chat Add all participants to the Chat
  - Send the following message:

Good morning everyone! We have a follow-up activity for last week's workshop on The Learning Trifecta.

Please follow this link (link goes here) to access the activity through Workday. Your manager will schedule time to complete the activity as a team. Once you've completed the activity, please return to this Chat to provide feedback to your peers.

ILT Session 3: Crafting Effective Courses

"Do Sheet Start-to-Finish"

- **Description**: This session utilizes 2 pre-recorded scenarios to lead participants through group and individual activities.
- **Time**: 2.5 hours
- **Classroom & Materials**
  - PowerPoint deck & display
  - White board
  - Printed participant materials
- **Preparation**
  - Reserve an appropriate meeting space.
  - Reserve rooms (one space for each team) for the Break Out Activity
  - Send invites to all participants.
  - Print out materials for each participant.

Instructions: Follow the scripting in the deck slide-by-slide.

Slide 28: Session 3 Welcome

{Welcome participants back}

{Say this} Welcome back to our third and final in-person workshop on The Learning Trifecta. In our last session, we stepped away from our Do Sheets a bit to identify the needs of our learners and create solutions to meet those needs. You then met as your groups to apply the concept to the learners your teams create learning solutions for. This is a huge step in building the foundation for learning content that's business driven by identifying how we can train our learners to carry out actions on the Do List to achieve The End Result.

{Check for questions}

{Continue to next slide}

Slide 29: Session 3 Introduction

{Introduce lesson} Today we're going to talk completing the remainder of the Do Sheets, including The Gap, The Dream State, Knowledge, Motivation, and Obstacles. We'll build on the activity I sent out on Adult Learning Theory to identify why these boxes matter and how they impact our course design decisions.

{Prompt Participants} At this point, we've reviewed 5 scenarios, yet, we haven't talked about how our fictional ID should deliver these learning solutions. There's lots of ways – eLearning, webinars, in-person workshops, Job Aids, game cards. Why haven't we discussed them yet?

{Guide to answer}

-We're too early in the process. Design decisions are driven on business and learner needs, so we need to fully vet those out.

-Selecting a delivery method before we know what we need to achieve can, and does, improperly influence our design decisions

-The Do Sheets are a safeguard to ensure we go about course design in the right order. They are our process.

{Prompt for questions}

{Say This} For today's session, we have 3 group activities. We're returning to Scenario 5 – the Garden Guardians scenario where our warehouse manager is rolling out training to other sites. With this activity, we'll talk about completing other areas of the Do Sheet. We've stretched Scenario 5 out pretty far, so we'll then move on to a breakout activity with our 6th and final scenario with Full Sun's Facilities Manager. In small teams, you'll complete the entire Do Sheet before coming back to present to the group.

{Prompt for questions}

Slide 30: Scenario 5 (Garden Guardians), Audio

{Say this} I'm going to replay Scenario 5 again. As a quick reminder, that scenario was an interview between Tyler, an Instructional Designer at Full Sun Growers, and Erin, a manager at one of their four Distribution Centers. In the scenario, Erin was about to roll out cost saving measures to the other centers and she needed Tyler's help with the training.

{Check for recall}

{Say this} When we come back, we'll cover The Vision, The Gap, Knowledge, Motivation, and Obstacles. The definitions for each one can be found on the Do Sheets in your participant guide.

{Check for understanding}

{Say this} The only area we aren't going to talk about is Practice. That's the section of the Do Sheet that brings together everything else and starts to hint at how you'll solve for the stakeholder's business problem. You'll have an opportunity to establish solid practice activities on your own.

{Check for understanding}

{Play recording}

Scenario 5 Script – Garden Guardians

[Tyler] Erin! It's great to see you. How have things been at the distribution center?

[Erin] Hi Tyler! Things have been busy but good. We've been working hard on our Six Sigma project to reduce costs from patio furniture damage.

[Tyler] Ohh! High stakes! Doesn't patio furniture deliver huge profits?

[Erin] Yes! It has the biggest margin of any category we sell. And it's going even better with the improvements we've made at my warehouse. We piloted a program to reduce costs associated with damage. We've seen significant improvements, so the program is being rolled out to our all 4 distribution centers. You know Full Sun loves to give everything a fun name so we're calling this program The Garden Guardians.

[Tyler] Hah! That's catchy. I'm already loving it. Tell me more.

[Erin] Sure. On average, 35% of the furniture we order has damage that makes it unsellable.

[Tyler] Whoa! Over a third. What do we do with it all?

[Erin] That depends. If it's received with damage, it never makes it off the dock. The vendor has to take care of it and usually that means it gets sent off to a liquidator.

[Tyler] Sounds good. So it becomes their problem.

[Erin] Yes, but it's our problem too. There's administrative costs associated with reporting the damage, labor costs to unload and temporarily store it, and an impact of insufficient inventory. This Spring we had a shipment of 8 teak Serenity Garden benches and all but 1 had splits in the wood. The distributor took them off our hands, but it was going to take 9 weeks to get replacements. It didn't make any sense keeping the samples in our stores, so we took a loss and sold off the samples.

[Tyler] I never thought about that ripple effect.

[Erin] Sometimes it's damaged upon receipt, so furniture was damaged either when it arrived or sometime between delivery to the warehouse and delivery at the customer's home. We've managed to reduce that significantly with our new guidelines.

[Tyler] Wow, that's a big improvement. What contributes to that high rate of damage?

[Erin] There were several factors. Poor handling practices, inadequate packaging, and lack of training were major contributors. We realized we needed a comprehensive approach to address these issues.

[Tyler] So, what changes did you implement?

[Erin] Our first big win was working with vendors on packaging materials. Adding about $3 to $5 in cardboard gave the boxes the added rigidity our boxes needed. We tagged in a packaging consultant, and it was pricey, but they helped our vendors ship in boxes that were reinforced in just the right spots. Three to five dollars in cardboard eliminated 60% of the damage sustained in shipping. Best of all, the vendors absorbed that cost!

[Tyler] Sweet! Do you think there's any training around that? It sounds like it's the responsibility of the vendor to package the product sufficiently.

[Erin] You're right, it is the vendor's responsibility. Typically, they do a good job but sometimes they miss the mark. The stakes are high on this merchandise, so The Garden Guardians program requires our inbound distribution center teams to do a spot check on packages over 30 kilograms. If there's an expectation, they report it to a supervisor.

[Tyler] Good call. What else are you doing to reduce damage?

[Erin] The next change we made was a simple designation that tells our distribution center staff who is authorized to move what merchandise. We have Lift Operators who have a designation of Lift 1, 2, or 3. After their initial training, new and seasonal Lift Operators start at a 1. After a certain number of accident-free hours behind the lift, they can certify for a promotion to Lift 2. And again, to Lift 3. Boxes with significant value carry a label with a 2 or a 3 to indicate who is authorized to move them.

[Tyler] Ahh. I'm guessing a Lift Operator 3 can move a box marked 2 or marked 3. But a Lift Operator 2 can only move a box marked 2?

[Erin] You got it. Right now, it's up to the Inbound supervisors to label the boxes when they come in. When we roll out the Guardians program to the other distribution centers, they need to recognize which products get which labels.

[Tyler] Who else needs to know the significance of the labels?

[Erin] This is tricky. There's a lot of work for our planners here. They use software to map out who picks what, but the software isn't set up yet to identify which products get a 2 or 3 designation. That upgrade is coming next year. So, for now, they need to manually check the assignment lists. For Phoenix and my center in Fontana, it's easy. Furniture is always stored in aisles 19 through 25. For Elk Grove and Aurora, they're not as organized and their planners really need to know their products.

[Tyler] That's a lot of responsibility. Do you have SOPs to help them?

[Erin] We do and it's working out well here in Fontana. The labels themselves act as a failsafe. The lift operators here know they are never to grab a package labeled with a number that exceeds their own designation. We made it easy, so no matter the language the lift operator is fluent in, the number on the package is a clear indicator of what they are allowed to pick. It's a bit of a culture shift, but we need to train our Lift Operators how to communicate with their supervisor if the label exceeds their designation and we need to train our supervisors to accept that pushback without exception.

[Tyler] That's a big shift. Do you have buy-in from everyone?

[Erin] We do. Damaged merchandise impacts the District Managers who oversee our distribution centers more than anyone. So they've been asking for this for a long time and are fully on board. The good news is we have some incentives coming. Each month, distribution centers who meet their damage goals get an incentive – anywhere from a party to a bonus depending where they land. So that's a great win for employees who get on board with the Guardians program.

[Tyler] Great! I feel like there's something to be said for employees who don't follow the program?

[Erin] This is pending HR review, so I'd ask you to keep it under wraps. But there's a disciplinary program for lift operators and supervisors who deviate from the program. Anywhere from exclusion from that month's bonus to termination. We can talk about the incentives in this training, but HR will cascade the other side.

[Tyler] OK. And you mentioned language considerations. Is that something we'll want to build into the training?

[Erin] Absolutely. After you put together a training package, my team is out to each center to train the supervisors and managers. That group has sufficient English language skills to attend that training so the scripting can be created in English. From there, we need to be creative.

Our frontline staff speaks a combination of English, Spanish, Korean, and Vietnamese.

[Tyler] That's a good thing to know. Is there anything that we need to produce in another language?

[Erin] There is. We're going to want printed materials like posters in the work areas and a revised sticker on each of the forklifts. For those materials, we want to lean on graphics whenever possible to convey a meaningful message. When text is critical, it will need to be in all 4 languages.

[Tyler] Got it. Is there anything else we should consider with this audience?

[Erin] Well, yes. And I don't want to sound critical, but we'll really want to be mindful about delivery. L&D has provided us great eLearning courses before and that probably went over great in corporate and our retail centers. This is an energetic group. Our best employees are used to having their productivity tracked so they come in ready to stay in motion. They have a finite tolerance for classroom time, so we want to keep the training short, with one topic a day. We're talking 5-7 minute bursts during their daily safety meeting before we lose them.

[Tyler] Good point! And I appreciate the feedback. Other than keeping the lessons short, do you have any other tips on what works well for this group?

[Erin] Absolutely. We mentioned the perks of the Guardians program so that should be weaved into your lessons. We also want to make sure the group understands that what they do matters so that they come in with a sense of pride. We could do a better job of explaining why they're here and what their work does for the customer and the company.

[Tyler] That's a slam dunk. Helping them link the importance of cartons marked with a 2 or 3 with what's inside would be huge.

[Erin] Yeah! I love that. The third thing is that this group needs to experience a new task hands on. This is probably where classroom-based courses fail. I need them up on their feet, putting labels on merchandise and identifying boxes with a 2 or 3 label. That kind of activity gets the gears turning.

[Tyler] This is great insight Erin. I think I'll have fun with this course. I can't wait to see how the program unfolds.

[End]

Slide 31: Scenario 5 (Garden Guardians), Group Activity

{Say this} We've listened to this scenario a few times now, so I'm eager to hear your thoughts about Erin's business problem.

{Check for understanding}

{Prompt participants} What is The Vision?

{Continue to next slide}

Slide 32: Scenario 5 (Garden Guardians), Group Activity

{**Prompt Participants}** What is The Gap in this scenario?

{This is a subjective question}

Continue to next slide.

Slide 33: Scenario 5 (Garden Guardians), Group Activity

{**Prompt Participants**} As an Instructional Designer, why does it matter that we understand The Vision & The Gap?

{Lead Discussion} SMEs often approach problems from a visionary perspective. They know what they want to occur and what the outcome looks like. They may or may not have a granular concept of what each person should do and what actions they need to take. Articulating an accurate Vision helps you, as an ID, align the course to that vision in terms of people, resources, culture. In terms of The Gap, this is where you can gather organizational context as to why the business is not achieving its objective.

Ultimately, it comes down to how you're going to apply learning theory, which is something we don't talk about much outside an educational setting. Learning theories are proven methods for ensuring your content is delivered with the right slant. In other words, it's how you make your learning stick. For instance, if you're trying to change behavior, it's helpful to apply transformative learning theory by incorporating the way your learners reflect on their assumptions and beliefs about how things are currently done. A good example would be re-training our stores to the Store of the Future model. Transformative Learning theory would encourage you to engage learners in a dialog to talk about why the company is moving to a new model and how they see themselves thriving in the new model. On the other hand, if you're relaying new information, like Erin will be with her cost cutting training, it's important to incorporate cognitive load theories so that you convey new information at a pace that matches your learner's ability to process it.

{Lead discussion} There's a lot to learning theory so we won't go deep. For now, know that we should at least consider why we're training to help us figure out the best solution. What are some good ways we can find that approach?

- Ask a peer
- Ask a GPT
- LinkedIn Learning

{Continue to next slide}

Slide 34: Scenario 5 (Garden Guardians), Group Activity

{Before continuing, pick an agreed-upon "Do"}

{**Prompt Participants}** Let's continue to Page 2 of the Do Sheet. For each "Do" on page 1, we should have an individual Page 2. For this exercise, we're going to focus on **{Insert Do}**. Let's start with Knowledge. What do our learners need to know to carry out this specific Do?

{This is a subjective question}

{Continue to next slide}

Slide 35: Scenario 5 (Garden Guardians), Group Activity

{**Prompt Participants}** What might be hard to learn?

{This is a subjective question}

{Continue to next slide}

Slide 36: Scenario 5 (Garden Guardians) Group Activity

{**Prompt Participants}** What information do they need to memorize and what can they look up?

{This is a subjective question}

{Continue to next slide}

Slide 37: Scenario 5 (Garden Guardians) Group Activity

{**Prompt Participants}** What impact does the Knowledge section have in our designs?

{Lead conversation}

- Part of our job is to tell them how to do theirs

- Identifying what they already respects their time

- We may need to make corrections when invalid knowledge exists

- Gaps in knowledge tell you where to spend your time conveying information

- Pointing them to resources helps them identify who, what, or where they can find answers

{Finalize discussion on Knowledge}

{Continue to next slide}

Slide 38: Scenario 5 (Garden Guardians) Group Activity

{**Say This}** Let's move on to motivation. I love this because there's a lot you can do with motivation and as a storyteller, an old-fashioned lesson tied in a contemporary story is my go-to.

{Prompt Participation} What are some creative ways you've seen motivation conveyed in a learning solution?

{This is a subjective question}

{Prompt Participation} Shifting to Erin's team, she mentioned a few ways her team feels motivated to do their best work. What issues did you hear her mention?

{This is a subjective question}

{Continue to next slide}

Slide 39: Scenario 5 (Garden Guardians) Group Activity

{Prompt Participation} In terms of Erin's End Result and Do List, what's going to help this audience care?

{This is a subjective question}

{Prompt Participation} Are there any thoughts on how Tyler is going to consider Motivation when he designs his course for Erin?

{Continue to next slide}

Slide 40: Scenario 5 (Garden Guardians) Group Activity

{Say This} The last box, but definitely not the least, on Page 2 of our Do Sheets is Obstacles. This has to do with environmental factors, equipment, personalities, communication, and so on. I hear this topic come up a lot because we have very different audiences as we span from our DCs to Guest Services to Retail and to Corporate. Each of these groups has a personality and unique needs. This category is one our Program Facilitators and Justin are dealing with because they're sorting out Obstacles in-the-minute.

{Prompt participation from our Program Facilitators} After delivering the same course dozens of times, do you find yourself constantly going back and making changes so that the Obstacles are getting smaller and smaller?

{Say this} For those of us that have less involvement in Implementation, particularly with eLearning courses, we have a lot that we can learn from this team about planning for Obstacles. Let's jump into our example with Erin. As an ID, what Obstacles do you think Tyler can plan for in his learning solution?

{This is a subjective question}

{Continue to next slide}

Slide 41: Scenario 5 (Garden Guardians) Group Activity

{Prompt participation} Specific to this Do, how can he prepare his learners for Obstacles?

{This is a subjective question}

{Check for understanding}

{Say this} We're going to wish Erin the best with her Six Sigma project and move on to Scenario 6, which we'll do in break-out teams.

{Continue to next slide}

Slide 42: Scenario 6 (Facilities), Break Out Activity

{Preparation: Prior to session, have workspaces for each work group ready-to-go}

{Say This} For the next activity, you'll use Scenario 6, our final scenario. You'll have 45 minutes to work as a team on this activity. That is going to go by very quickly, so Scenario 6 is possibly the easiest problem to solve for, but there are still some real obstacles and motivational issues to consider. We'll going to listen to the Scenario together then break out into small groups based on your teams.

Once in your teams, complete a Do Sheet. For time, you can pick a single "Do" and we'll skip the Practice box.

{Play audio}

{Break out the groups to their workspaces}

Slide 43: Scenario 6 (Facilities), Break Out Activity

{Welcome participants back} We're back for our group presentations and I'm eager to see what you've come up with. To keep you on your toes, I'm going to do things a little different. I'm going to go around the room and call on teams at random to answer one of the 4 questions on the screen.

{Lead conversation by calling on teams at random.
Ask the first team to answer the first question, then have a second team provide additional insight. Ask the third team to answer the second question, then have the fourth team provide their insight. Continue that cadence going through all four questions.}

{Allows the teams and leaders to engage in a meaningful dialog. Ask probing questions, if needed, as they come up.}

{Continue to next slide}

Slide 44: Session 3 Debrief - Expectations

{Say this} We've covered a lot today. I sincerely hope the mix of scenarios and activities has been helpful.

{Pause briefly} We have one final activity and that's on the Practice box on Page 2 of the Do Sheets. You'll receive instructions shortly – the activity will include some self-paced work and a final team exercise to create the ultimate example of a great Do Sheet.
Once your team has the sheets completed, we're going to post them in a Teams Chat. I'd appreciate it if you shared your praise, suggestions, and questions in that chat because this is an important dialog to have in the group.

{Pause for any feedback] Once that's done, Lucas and our managers will be looking at the Do Sheets from this activity and gathering to provide us with their final thoughts in our L&D Total Team Meeting.

{Check for questions}

Slide 45: Session 1 Debrief - Feedback

{Say this} With the last few minutes, I want to turn the floor over to Lucas and our managers. First, a few words on what types of things you steer away from when identifying who your learners are. Then, we'll get some feedback on the team's observations in terms of what went well and should be repeated, and where our opportunities are as we move forward.

Follow-up Activity 3: Crafting Effective Courses

- **Description**: This team activity supplements ILT Session 3 and takes learners through the remainder of the Do Sheet.
- **Time**: Self-paced
- **Classroom & Materials**
  - All materials are available through a Workday Rise Course: (link goes here)
- **Preparation**
  - Initiate activity 2 days after ILT 3 occurs.
- **Instructions – Manager Communication**
  - Send the following message in the Teams Chat, "Trifecta Activity: Manager Chat"

Good morning! I am about to send out the follow-up activity for last week's ILT to the team in a separate chat titled, "Trifecta Activity: Do Sheet Start to Finish". The materials and instructions can be found in a Rise course published to Workday: (link goes here).

The activity will round out the Do Sheets by taking your team through the Do Sheets from start-to-finish. As we transition from classroom activities to independent proficiency, your guidance will play a significant role.

In this activity, your team members will return to Scenario 5 to complete the "Practice" box on their own. Please schedule time to meet as a group to discuss what they came up with. Then, as a team, complete a Do Sheet start-to-finish using Scenario 6.

Once completed, select one person to post your Team's Do Sheet in the Teams Chat titled "Trifecta Activity: Do Sheet Start-to-Finish".

Please encourage your team members to participate in the chat and provide feedback to their peers in the chat.

- **Instructions – Participant Communication**
    - Create a Teams Chat titled, “Trifecta Activity: Crafting Effective Solutions”
    - Add all participants to the Chat Add all participants to the Chat.
    - Send the following message:

Good morning everyone! We have a follow-up activity for last week’s workshop on The Learning Trifecta. This will be our final activity for our Program.

Please follow this link (link goes here) to access the activity through Workday. Your manager will schedule time to complete the activity as a team. Once you’ve completed the activity, please return to this Chat to provide feedback to your peers.

Thank you all for your hard work!

Final Mile Feedback

- **Description**: The leadership team will provide feedback to participants on their progress, including observations, strengths, and opportunities.
- **Time**: Self-paced
- **Classroom & Materials**: None needed.
- **Preparation:** Connect with Lucas to schedule time at the next L&D Total Team meeting for feedback.