

# DESIGNED TO SUCCEED



## 20 THINGS I KNOW THAT HELP MAKE LEARNING DESIGN INITIATIVES SUCCEED

Dr. Geoff Cox, Design Director



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Learning Design Initiatives succeed



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## PREFACE

I began my working life as a trainer, and, over the first 10 years of my career I diligently built the skills I needed to be what I told myself I could be - a very good trainer. I developed the ability to sense the needs that were at play in individuals and working groups, to achieve balance in both responding to the emergent learning in a group whilst moving towards predetermined learning outcomes, and to have the strength needed to leave my own ego outside of the classroom. I was proud of my successes and reflective about where I could improve, but through all of this my overwhelming work-identity was as a trainer. It came, then, as rather a shock, when I was told by a respected colleague, that it wasn't as a trainer that I excelled, but as a designer.

The conversation that followed that observation informed me that what I thought of as training skills were much better defined as learning design skills. These included a strong drive to move away from accepted ways of delivering a curriculum and to re-craft content and processes to better meet the needs of specific students, a clear desire to develop content that delivers against desired outcomes, yet leaves open the opportunities for serendipitous learning, and a confidence that students will make their own positive choices about their learning if the person at the front of the classroom can confidently accept the role that I describe as a 'Catalyst-Enabler'.

Since then I've progressively moved towards becoming a specialist and expert in experiential learning design, the last 13 years as Design Director with RSVP Design Ltd. And it's been a very rewarding career: I've worked with thousands of people from hundreds of organisations - Corporates, Business Schools, NFP's, and Universities on just about every Continent.

It's also fair to say that in that time I've learned a lot about what gives Learning Design Projects the greatest chance of success. This is what still guides me when it comes to negotiating and setting up new projects; the things that enable me to do what I'm best at - creating learning environments that deliver for my clients. These are the things that, if I'd known them 30 years ago, would have made it easier to avoid the potential pitfalls that exist where organisations contract with designers of learning.

This collection of personal knowledge-nuggets is intended to help anybody who is engaged in putting together Learning Design Initiatives - either as representatives of a contracting organisation, or as a design specialist from an outside supplier.

## SECTION 1 - BEFORE THE DESIGN WORK STARTS

### 1. You've got to know what you're trying to achieve at an individual learner level

Most briefings for learning design work are based on what needs to be learned by groups - teams, departments, functions etc. But the success of your learning environment depends on it being engaging and effective at the level of the individual learner.

Bridging the gap is about putting the right questions to the right people.....and it's unlikely that those people work for L+D.

If new learning is going to improve the performance of the organisation it needs to be visible in the day-to-day behaviour of the learners. So ask the people who see them on a daily basis.

You need to get as close to the learners as possible and ask questions such as:

What behaviour change does this learning need to produce?

Why is that important?

What will it enable people to do that they don't do now?

Speaking to line and operational managers is often the best source of information about what your design really needs to deliver, and if L+D can't see the point, or don't think it's necessary, then perhaps it's time to come up with some other questions that L+D need to answer.



### 2. You've got to know how you're going to measure your success

Evaluation is usually the last act of a learning process, but defining it needs to be one of the *first* acts of the learning design process. Establishing what will be evaluated, and how this will happen, gives the design team a clear steer about what their learning environment needs to deliver. The earlier this definition is established and accepted, the earlier the design process can be initiated with a clear sense of what it aims to achieve. Before this it's impossible to move beyond the broadest of concepts.

Your first conversations need to be with the commissioning team to ensure that they appreciate the importance of getting the evaluation focus and process in place early. They have to be measuring more than just learner reaction. It's also worthwhile using the conversations you're going to be having with line and operational managers to test this understanding of what the evaluation process suggests you need to deliver. Is it measuring changes of behaviour? Are these agreed as the right outcomes for the business? Does the evaluation process complement the learning available?



## SECTION 1 - BEFORE THE DESIGN WORK STARTS

### 3. You need to know a lot about the learners and their learning history

Adults enter the learning environment you have created as fully- functioning and experienced learners, each with a different history of educational experiences and a well developed set of preferences about what works for them. Your approach to making your design a success, therefore, needs to be Generative Learning, i.e. starting where the learners are, rather than where you think they might be.

It's obvious that you can't create a learning design specifically catering for every individual, but you need to get as close to this ideal as possible. To do this you need to know as much as you can about who your target audience are and how they're likely to be feeling when they encounter your material.

What learning have they been offered recently?  
And why?  
How did they react? What did they take from it?  
Are there any patterns in the learning-history of this population?  
How much do trainers / facilitators enjoy working with them?

These are the kind of questions that will allow you to have your learner at the front of your mind when you are designing a learning environment that will work for them.



### 4. Have the Strategy Conversation



No matter what level of an organisation you're designing for, you should be able to draw a direct line between the learning you're making available, and the strategic direction of the organisation. If you can't easily draw this direct line you need to be having 'The Strategy Conversation'

Senior leaders should be interested in every investment they make, and your time creating a learning design is an investment by the organisation. Tap into this interest by engaging the appropriate senior leader(s) in a discussion about what your design needs to deliver for their strategy to work.

I'm not underestimating how difficult it may be to engineer this conversation. L+D will probably tell you that the job has already been delegated to them and any further contact with the sponsoring leader is spurious (there's also often the fear that if you contact senior leaders then it will reflect badly on L+D). The best solution to this political standoff is to aim, from the start, for "The Divine Triangle of Learning Design" - see No. 8 for details!

## SECTION 1 - BEFORE THE DESIGN WORK STARTS

### 5. Get your Sponsor(s) and Advocate(s) in place and know how to reach them

Sooner or later you're going to need guidance, or an opinion, or a decision, that can only come from somebody who understands how your project is intended to contribute to strategy implementation. At that point the last thing you should be doing is trying to build a relationship with the person you need.

Early in the lifecycle of your project you need to ensure that you have the strongest possible sponsorship and advocacy from organisational decision makers, and that means that, should you need to hit the phone to them, they know who you are, and why it's important that your work succeeds. Time spent on early relationship-building is great insurance to avoid or solve later problems.



### 6. Know what language your Sponsor(s) and Advocate(s) prefer to use when they talk about the project



Once you know who the people are who have an interest in supporting your project, you need to spend some time figuring out what language they speak when they are talking about it. This doesn't mean English, or French, or German (although that could be very important for how you communicate). When I speak about language I'm referring to the way these people use language to communicate their interests and preferences, because that will largely determine what aspects of your project will be important to them.

For instance, a Finance Director, using terms like ROI and Investment, will probably look at your progress and relative success differently from an HR Director talking about Engagement and Social Capital.

If you've managed to contact several sponsors, from different functions across the organisation, and you have listened carefully to the clues they will give you about what's important to them, then you should be able to identify which of them you need to advise you depending on the issue you are currently facing. This makes progress and problem solving much easier as you can use each sponsor differently and in a more targeted fashion.

### 7. Learning Design and Instructional Design are very different animals



Again I'm going to open by saying that this is a very personal perspective, and, crucially, written as a UK practitioner. I always describe my work as Learning Design, and I always tell people that I'm not an Instructional Designer. The reason being that I see the two roles as complementary, but very different.

The metaphor I turn to is that of a map - I see learning design as the origination of the map, deciding what it's for, who might use it, what they would need from the map, how much territory it might cover etc etc - the big questions around how the map looks and feels in use.

I think of Instructional design as taking the map, adding extra detail and using it to plan specific routes and journeys - the more detailed work that directs and formalises the use of the map.

Working specifically in the field of experiential learning my aim is to create design vehicles that permit a great deal of flexibility in what learning outcomes can be addressed by a facilitator working with my design. If I'm then required to hand a piece of my work to an instructional designer I think of *their* role as then reducing the flexibility so that the map is made more specific to the narrower needs of a particular group of learners or tight learning objectives.

The skills required to do the two jobs show some overlap, but in my opinion are different in terms of the mindset required to be successful in the two disciplines. There's a lot of divergent thinking in learning design, more convergent thinking in instructional design. A key to having a long and fulfilling career is to be very clear with yourself and your clients about where your skills lie, and what service you're offering to the client. In particular there is a Trans-Atlantic difference in the way that the professional terminology is used, so be particularly diligent in establishing clear expectations before you start work.

## SECTION 2 - AT THE EARLY STAGES OF YOUR PROJECT

### 8. Aim for a small lead team that represents the Divine Triangle of Design



Working inside of a client organisation can be frustrating, particularly when it comes to getting clarity of priority and purpose. Frequently there are different factions who see the world of your project in very different ways, and this can lead to slow or unclear decision making. The best way to avoid this situation is to have a lead team that is only as big as is required to represent all of the interested parties. My own preference is for what I call the Divine Triangle of Design - an L+D representative, a representative from the target consumer group (usually Operations) and me as the visiting industry expert.

I've always found that this team structure provides an environment characterised by close personal relationships where meaningful discussion produces the best contribution from each representative, naturally and efficiently.

### 9. Practice the art of Naive Expertise

When working on a design brief for a client I have often found myself to be the only non-organisation 'outsider' in the team. This can be intimidating, but it can also be a position from which a great deal of power can be leveraged, and used to benefit the project. The key to making this position work is to adopt what sounds like a totally paradoxical position - Naive Expertise.

Let's cover the Expertise first - you're in the team because you're a design industry specialist and expert, so you're not fulfilling your remit if you don't make that expertise available to the client.

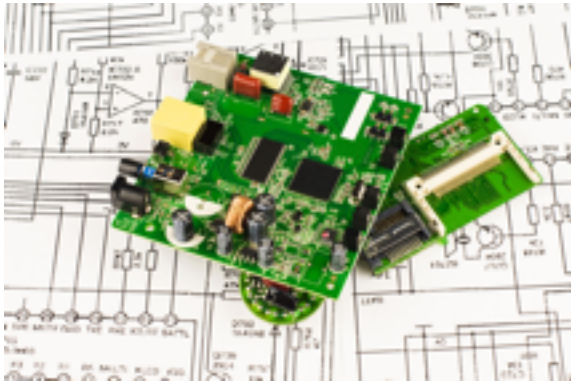


But Naive is a bit more tricky. Being an outsider means that you can't be expected to know everything about the organisation, and you won't be considered dumb, or insolent, for asking the questions that insiders can't, or won't, ask. Yet these are often the questions that really need to be asked if your design is going to be innovative and impactful.

Naive Expertise is a blend of the two states - being innocent enough to pose the unconventional questions, whilst bringing your industry experience and talent to the table. It takes some practice to get the balance right, but when you get there you'll see that it can really be your 'design sweet-spot.'

## SECTION 2 - AT THE EARLY STAGES OF YOUR PROJECT

### 10. (Just about) Anything can be integrated into a design, if it is identified early enough



In my very first point I talked about knowing what you're trying to achieve at an individual learner level. By extension, individuals learn in different ways, so you need to be creative in the range of approaches you use to make the learning attractive to, and effective for, different types of learner.

It's very easy to be dismissive, or bound by habit, or limited in your thinking about what should be included in a piece of learning design. Recognise these as demonstrations of either a lack of creative thinking on your own part, or just plain laziness.

Either way, you owe it to your client and yourself to constantly push the envelope that limits the tools and approaches you draw on in your design. Later in the project it will be harder to introduce something new, so use these early sessions to think about creative ways to convey the learning you need to achieve.

### 11. Learning Aims and Objectives aren't 'file and forget'

Prior to getting a project underway the Learning Aims and Objectives need to be identified, formulated, published and agreed - that's got to be Rule Number 1. But Rule Number 2 is that these vital words need to be regularly revisited throughout the life of the project.

On too many occasions I've seen a project establish clear Aims and Objectives at an early stage, then never revisit these once the design work starts. The result is that, as the project team moves forward, their (individual and collective) memory of what the Aims and Objectives actually say becomes increasingly ill-defined. The horizon blurs and consternation breaks out as they arrive at a place that was never on their map. Looping back to the Aims and Objectives needs to be a regular part of the design process, but it's one that has many benefits.

It keeps the Aims and Objectives open to challenge and possible renegotiation in the light of what is being learned by the design team. It keeps the design team moving towards a common goal and allows them to judge when they have arrived there. It allows progress to be monitored and reviewed. Above all it forms the purposeful glue that holds the team together for the life of the project





### 12. Trust the Process



There are a whole lot of things that can happen early in a project that might make you less than confident about your ability to deliver. You need to accept that this is a normal part of putting your creative-self out there in the marketplace: if generating brilliant new ideas was easy then it wouldn't be half as much fun as a job!

The key is to have a firm and unwavering belief in the design process that works for you. That isn't to say that you shouldn't be open to ideas from others, or feedback, or criticism, or even challenges. Rather you should recognise these things as **part of the process** and a way of staying grounded in a solid way of working.

**Be confident - you're good!**

### 13. If you're excited by the project there's more chance that the learners will be excited by your product



There are projects that are so engaging, so intriguing, so exciting, that they live in your memory for ever. There are also projects that simply don't have much going for them by way of professional challenge and engagement. The temptation is to just get these mediocre projects delivered and move on, bank the cheque, pay the bills: but there are some serious reasons not to go that way.

You can guarantee that the people who are involved at the delivery end will know the difference between a project that excited and inspired you, and one that didn't - *and so will the*

*learners*. You owe it to them all to bring some magic into your creative process. So where does the magic come from?

- Maybe it's an excuse to collaborate with somebody new, or somebody whose work you admire. Rather than wait for 'the right project' make this one your opportunity.
- Try working in a different, more inspiring place: mobile means you really can work anywhere.
- Look for the chance to introduce a small element of something new - perhaps something you'd like to feature big in a future design.

However you do it, get excited and your learners will know it and appreciate it!

## SECTION 3 - DURING THE PROJECT

### 14. Accept the Paradox. The L+D profession is often ultra-conservative and change-averse



There are some great people working in L+D, but there are also some people who demonstrate very little appetite for the changes that are inherent in learning or development. Work with the former and you will find that they share your passion for people and their potential to grow and change: work with the latter and you will find that you're not going to be allowed to create anything that even hints at challenges to the status-quo.

My experience is that these people are very hard to move, and anything that you do to try to change them will make for, at best, uncomfortable working relationships. Acknowledge where the power lies, accept the paradox that in this organisation, learning and development has come to mean almost the opposite, box-ticking is how progress is measured.

**Do a professional job, move on, don't go back.**

### 15. However good it is, your design will flop or fly based on conditions in the delivery environment

As a learning designer there is often little you can do to control the environment within which your design will be delivered. You can scaffold the design as much as possible, offer copious ideas about what will make the design fly, create a commentary around the pilot process, but sooner or later the design will be out there as a learning environment, and at that point you can have very little influence.

There's often a reluctance to let go, as creatives we view every design as part of ourselves, and this can produce high levels of stress as we entrust others with our babies. But, like parents at the school gate, we need to be able to say goodbye and entrust our offspring to another set of professionals.



And if it doesn't thrive and survive out there? Find out why, learn what you can, don't be quick to assign all the responsibility to others - own the feedback that's yours. In addition, if it was the venue, or the food, or the technology, or the other elements of the programme, or how it was delivered, or a hundred other factors that were outside of your control, then accept that you're only one link in a chain. If you're happy that your design was right then move on, but keep this experience as a ready anecdote to use the next time you need to ensure that your client has control of the delivery end.



### 16. Be careful about who sees your Betas!

Exchanging information within a design team is a valuable and rewarding part of the job. It keeps people in touch with your progress, develops mutual respect and trust, and keeps people informed about how different parts of the project are progressing.

There is a danger, however, that somebody from outside of the team gets to see a beta-version or a work-in-progress, and doesn't understand the purpose that underlies its release. What you see is an early prototype

that would be good as a straw-man for drawing feedback, what an outsider might see is a poorly designed and amateurish effort that is certainly not worth what they are paying for your services.

Keep control of who sees your early work on a project, and make sure that they understand what intention you have in releasing it. I often work from sketches (hard and digital) until late in a design process, this works for me but it also encourages others to think 'sketch-pad work - preliminary thinking - that's OK'.

### 17. Different people, different pilots

People have very different ideas about the purpose of a pilot run-through of a piece of learning design. This ranges from a full dress-rehearsal that should be indiscernible from a 'real' delivery, through to a stage of the design process that simply introduces warm-bodies into the mix. I tend towards the latter end of this spectrum, but I've learned the value in not accepting that everybody shares this position. My preference is to go to pilot early, let those involved know that they are part of a design process, and make sure that we all learn masses from the experience. Others see the event very differently.



It's very important to discuss every aspect of a pilot - where it happens in the process, what learning is being sought, how will its success be judged, what happens afterwards etc etc. Too many times people will use the term without establishing its shared meaning for this client. Make sure that it gets plenty of air-time and that what you end up with is clear, recorded and accepted.

**One clear distinction that needs to be shared by everybody involved in the project "Prototypes and Pilots are different"**

### 18. One size doesn't fit all. Changing the target learner population means revisiting the design



Watching one of your designs take-off and become a success is a great feeling, and you're right to feel proud of the work you've done. There are, however, some potential dangers to be found lurking in this climate of success.

One such danger is that the client sees another application for your design, another population who might benefit from the learning available. This is wholly understandable, the client has invested a lot of time and money into your work and they are

looking to maximise their ROI. However, if you've done your job properly then your design has been specifically created for a particular population and there is no guarantee that it will achieve the same results in another context. In particular, moving the design into another culture (international, organisational or functional) without adaptation is fraught with danger.

Make sure that your design includes a strong statement about the target group for whom it has been created.

### 19. Be positive about rejected ideas - file them carefully and somebody else will love them



It's a very rare occasion when your first ideas are exactly right for the design you're working on. However, they are your ideas, and you've got to believe that they are good ideas, so take care of them. Record keeping isn't always a well-developed skill in any design profession with the result that a lot of good ideas get lost and forgotten. Keep a design-log or design-book, and keep it up to date! Given the recording devices we all carry in our pockets there is no reason for any idea, no matter how embryonic, to get lost. Consulting this record can be a source of inspiration, especially when ideas don't seem to be flowing freely. It could also short-cut the initial design stages for a new project by providing early sketches and notes.

**Ideas are your professional currency - treat them as what they are, valuable demonstrations of your expertise.**

## SECTION 4 - AFTER THE PROJECT

20. Be sure that you know when it's finished..... (then celebrate)



I started this piece of writing by talking about what you're trying to achieve, and how you're going to measure it. These things *should* tell you when your design work is finished, but on many occasions the evolution of the project means that things are not quite so clear as they were when you started. This situation is often compounded by strong relationships that have developed in the design team, how can you maintain the relationships whilst letting the project go?

Often the best way to draw a line under the project is to ask for a client meeting that formalises the handover of the design. Use this as an opportunity to list the deliverables as you understand them, and describe how you've accomplished each one of them. At the end of this meeting you should have made the client aware of the quality of the work you've done, and simultaneously you've cemented a professional relationship. This should put you in a good position to work with that client again.

It's now time to celebrate - almost!

Just before you let your hair down take a little bit of time to focus on your own learning:

What have you learned from this piece of work?

How did you learn it? What helped? What hindered?

What changes will make your next engagement a richer source of personal and professional learning?

Record your answers in a way that keeps them visible - and NOW it's time to celebrate.

**Enjoy!**

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