



LEARNING EXPERIENCE DESIGN ESSENTIALS

CARA NORTH

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“Cara’s book is a fantastic resource for professionals who are new to instructional design or those who have been in the trenches for a while, and I love that she includes 30/60/90-day plans as well as other resource tools as guidance in every chapter! I found myself laughing and shaking my head as I read her spot-on reflections and examples.”

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“Cara North provides much needed clarity around the core capabilities of a learning experience designer and how the role can positively affect change in any organization.”

—**Joseph Suarez**, Learning Experience Designer, Suarez Media Production

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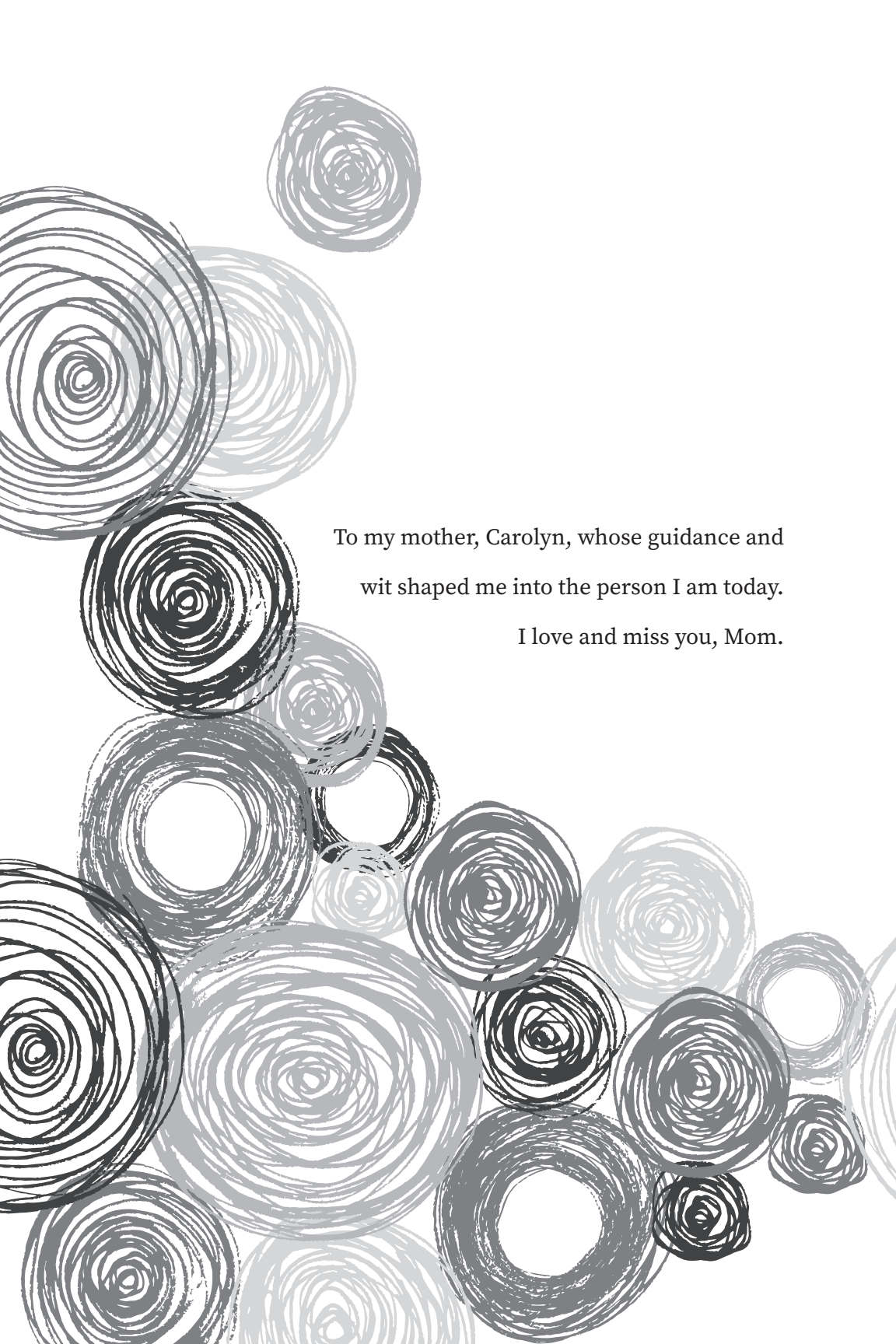
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Text Designer: Shirley E.M. Raybuck

Cover Designer: Brandon Rush

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To my mother, Carolyn, whose guidance and
wit shaped me into the person I am today.

I love and miss you, Mom.

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Introduction

A Call to Action

It's the news that no one wants to hear: an impromptu meeting with HR appears on your work calendar with no context. Hearing the words “your job has been eliminated,” no matter the context, is always difficult. Over the years, this has happened to too many people I care about in the talent development industry.

I joined the talent development field accidentally, but I stayed in it because I love helping and being part of someone's success. That success could be upskilling to a new role; it could be doing your job better; or it could simply be the satisfaction of finding an answer when you need it. The work that we do in learning and development is essentially about being in the people business. People are complex creatures with free will and often have many emotional layers. Regardless of the complexities, I hope we can all agree that the dehumanization many experience when losing their jobs leaves a scar that is difficult to heal.

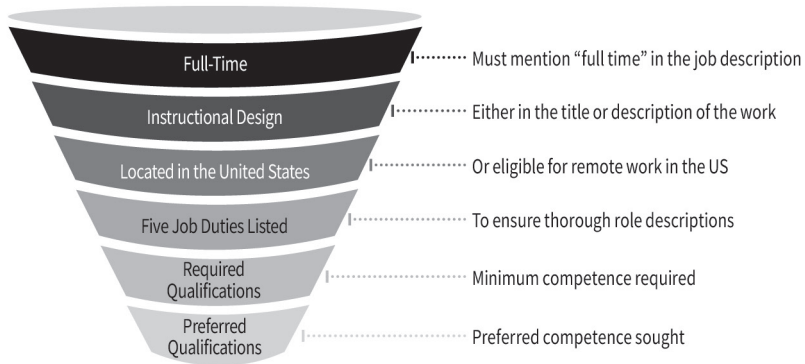
As I saw this happening across the talent development field, I wanted to do something. So in 2020, I started posting a roundup of open instructional design jobs on LinkedIn to try to help as many folks as possible. What started as a weekly post turned into at least three to four posts a week. This gesture became a habit, and I connected with many people who said that they found their next opportunity through my posts. Along the way, I read many job descriptions, which got me thinking about the evolving roles in instructional design. After reading so many job postings, one thing became clear to me: Instructional design as I knew it had an identity problem.

The “Instructional Designer” Is an Endangered Species

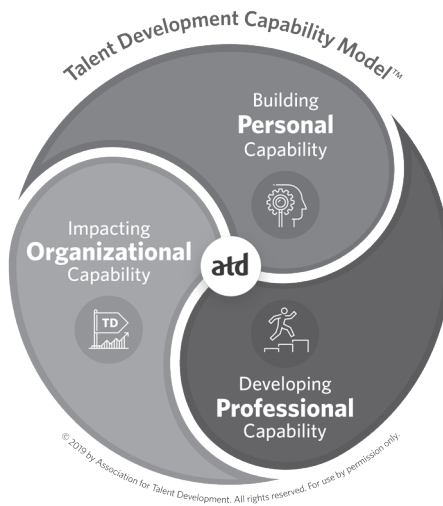
I got my start in the talent development field by doing some training in a call center. It wasn't my primary role, but it was by far the most enjoyable part of my job. Then, when I went to work at Amazon, I had an opportunity to work as an instructional designer; I wasn't the one delivering the content, but I was planning it. Believe it or not, this was before e-learning authoring tools, so I'd storyboard and map the curriculum and build it in the learning management system (LMS). Because this was my formative instructional design work experience, I thought the instructional designer was also the curriculum mapper and the e-learning developer.

It has become rare that job postings looking for an instructional designer seek someone who only designs learning content. Today's job postings want someone who can do everything: needs assessments, storyboarding and curriculum mapping, e-learning development, LMS administration, knowledge management, learning information architecture, assessment and evaluation, and the list goes on. It is no longer enough to be an instructional designer. Those who can't transition and do more, sadly, have been left behind. So, what happened to the OG instructional designer in the workplace? Their role has been adapted by organizations that don't fully understand the value of what instructional designers bring to the talent development team. Further compounding this issue, if you ask 20 instructional designers to provide an instructional design job description, you will get 20 different answers. This is due to the vast differences in how instructional design is operationalized in our organizations.

But my hunch wasn't good enough for me; it fed my curiosity to do academic research on the topic. From the beginning of June 2020 through the end of July 2020, my research colleagues and I collected instructional design job descriptions from a variety of resources including LinkedIn, Indeed, and HigherEdJobs. While it was impossible to collect all titles similar to instructional designer, we did search for other terms—like *LMS curriculum developer* and *corporate learning and development specialist*—and we set the following inclusion criteria (Figure I-1).

Figure I-1. Inclusion Criteria for Job Description Research

We then coded the job descriptions that fit our inclusion criteria in accordance with the three main capabilities of ATD's Talent Development Capability Model (Figure I-2). We wanted to answer the question, "What can we learn about the requirements of instructional designers from current job descriptions in comparison to the Talent Development Capability Model?"

Figure I-2. The ATD Talent Development Capability Model

My assumption before doing this work was that the instances mentioning parts of the Impacting Organizational Capability (IO), specifically

business insight and performance support, would be through the roof. It wasn't that way at all. Among the three domains within the Talent Development Capability Model, the Developing Professional Capability (DP) had far more mentions than the other two. When analyzing 100 job postings, we found 346 instances of DP, while there were 193 instances of the Building Personal Capability (BP) and only 94 instances of IO (North et al. 2021). I deconstructed these findings because I was truly shocked at the results. I wondered if this was the result of an assumption that some IO skills and capabilities were necessary and inherent to instructional designers, and so didn't need to be spelled out in job descriptions.

The research only increased my curiosity and fueled my quest to understand how we do the work we do. What is the work that instructional designers do? Often, it's building storyboards or mapping curriculum, but, especially in the past few years, I've seen more job descriptions require IDs to also do the work of an e-learning developer. Also, depending on their organizations, IDs may facilitate training sessions virtually or in person. So how many hats should an instructional designer wear, and what does this mean for the future of our work?

Organizations Want More Results on a Quicker Timeline

Talent development functions are often not money makers; they are money takers, and our organizations are aware of this fact. Many companies see the work we do through a lens of risk mitigation.

Imagine you create a training course on how to manufacture a widget. This course is delivered to every widget maker in the factory. Every widget maker completes the training course and passes based on a poorly written multiple-choice test. (Don't worry; we will talk about assessment and evaluation later.) A few weeks later, a widget maker makes a mistake on the job, damaging the equipment used to manufacture the widget. The organization does a root-cause analysis and determines that because the training course covered the relevant process, the widget maker should be terminated. The widget maker sues, saying they were not trained appropriately to make the widget, and is seeking back pay and damages. Meanwhile, you

are now in the hot seat for your training course. Why did you build it this way? Is it legally defensible in a court of law?

While scary, this example is based on a real situation (although in a different industry). It was a mess for all parties involved. For the widget maker, they felt like they were set up to fail. Why were they expected to be perfect on the job when their only training was a course that everyone went through once? They didn't have an opportunity to ask questions or a safe environment to practice in. For the organization, a lot of money was paid to the talent development department via salaries, learning technologies, and professional development. If the department can't protect the business in situations like this, what good is it? For you, who created the training course, maybe you were set up to fail by a pushy subject matter expert (SME), a tight timeline, and nothing more than a content dump of PowerPoint slides to use as the basis of the course.

I like to say that I'm not in the underwear business, so I don't want learning experiences to only be used to cover the bums of the organization. Are we now expected to be legal experts who can provide our organizations with legally defensible learning experiences? If this is something you haven't thought about yet, you likely will at some point during your career. Many organizations use the learning experiences we create as punitive compliance orders instead of as support functions to employees. I'm not going to sugarcoat it; your mileage may vary depending on where your department sits in the organization, your leadership, the composition of the talent development team, and the size and geographic footprint of the company.

I encourage you to put this in your skillet and let it simmer so the message is very clear: Our organizations want better results, yet they often dictate resources (people and money) without allowing for requests from us.

What Is Learning Experience Design (LXD)?

To this point, I've discussed instructional design. You may be reading this wondering why the title of this book is *Learning Experience Design Essentials*. So, what is the difference? To me, *learning experience design (LXD)* is the combination of content and context to enable human

performance—and that’s what elevates LXD. That’s what the widget maker situation described in the previous section actually needed.

Content is a combination of the information, images, and media that help provide enough knowledge to enable someone to execute a task. Traditional instructional design focuses on the content but often misses the mark on one critical piece: the human connection. How does someone relate to or engage with the learning experience? My PhD advisor, Kui Xie, a scholar in student motivation and engagement, published some research on the topic of learning engagement that came up with three constructs: behavioral engagement, cognitive engagement, and emotional engagement (Xie, Heddy, and Greene 2019). I’ve embraced these constructs because if you search for an answer to the question “What is learner engagement?” you’d get so many responses. These three constructs of engagement, as outlined in Table I-1, make sense when crafting learning experiences.

Table I-1. Constructs of Engagement

Behavioral	Cognitive	Emotional
What are they doing?	How are they being challenged?	How does it make them feel?

Too often, the instructional design approach doesn’t consider the emotional engagement construct. While some IDs have embraced techniques such as empathy mapping and design thinking, too often the focus is only on the content in the learning experience. Going back to the point of the work that we do to help empower people to do their jobs better and move up in their careers, can we truly do that without a level of engagement and emotional connection? That’s where context comes in.

Context comprises everything going on while learners attempt to apply content to the job. One of my favorite quotes from Michael Allen (2020) is “when it’s time to perform that is not the time to practice.” How often are there gaps in content from someone taking a traditional e-learning course on a topic but not being able to apply it for months? Worse is when they are forced into a one-and-done system, which is how many learning technologies share content. If someone wants a refresh later, they often

have to go back through the e-learning course in its entirety. LXD embraces the idea that people need practice and resources to enable performance. This isn't a new concept—Judith Hale and other human performance pioneers have beat this drum for years—but I think that as we pivoted from instructor-led training to e-learning, so much emphasis was put on the aesthetics that the content and ultimately the human experience got lost. So much of instructional design is cognitive, meaning it focuses on what someone should know about a topic. Even the term *instructional design*, emphasis on instructional, implies being told what to do, almost as if there is an authoritative figure pointing a finger at you. While this may work in some situations, I argue that the modern workplace is far more nuanced and needs an approach that isn't one-size-fits-all. In fact, I've been guilty of this myself, but I'd often rather work than take a required e-learning course that is created in a punitive way with locked navigation, quiz questions that can be easily guessed, and so much content I can't remember what happened three slides ago. Context takes into consideration the work environment, the type of person who is in the environment, and the challenges in execution. Context matters and is missing in some instructional design approaches.

I fear that if L&D doesn't change across the board to focus on content and context (learning experience design) over shiny deliverables, we will be written off as transactional. Allow me to give an example to illustrate this point.

I had the honor of speaking to M. David Merrill and had the opportunity to ask him a question: What is the relationship between learning technologies and instructional design? He crafted a beautiful analogy of a semitruck and cargo. According to Merrill, the impact of a learning experience is the cargo, and the learning technology that delivers it is like a semitruck (as depicted in Figure I-3). When we focus so much on the learning technology and shy away from the learning experience design, we are missing the point. The semitruck can have all the bells and whistles, but if the content is broken or the context isn't incorporated, it's like the cargo showing up damaged and unusable. It doesn't matter that the semitruck is fancy if the cargo isn't what you needed. How often is the focal point on

what a learning authoring tool can do or what features an LMS has instead of on the content and how it will be used in context? L&D becomes transactional instead of meaningful when the focus is delivering shiny e-learning modules (big fancy trucks) instead of effective learning experiences (usable cargo).

Figure I-3. Semitruck and Cargo Metaphor From M. David Merrill



What to Expect in This Book

Through sharing my experience, I hope to provide you with value, whether you are just getting started on your LXD journey or wanting to try new things in your work. I've had an eclectic work background, starting in a call center and then working at Amazon before moving into higher education, learning leadership, and finally to full-time consulting. These experiences have shaped me into the talent development professional I am today. I've also been fortunate enough to be formally educated in learning theory and science. I enjoy keeping a foot in the higher education space as an adjunct professor at Boise State University and as a reader of learning research; I even do my own academic research.

Also, to be transparent, I have made a lot of mistakes! While I think that failure is a critical part of the learning process, I argue we should make it cool to fail in our learning experiences as long as we're in a safe environment to do so. This book will be full of stories and mistakes I've made along the way. This certainly doesn't mean I'm perfect now or that I ever will be, but I hope that you are able to relate to my experiences and consider if you've had similar situations. I hope my stories spark you to reflect on how you would have done things differently.

This book is for folks new to instructional design and those looking to elevate their skills and strategy. If you don't fit these roles, I still hope it

can add value to your toolkit. I want to help you transform learning experiences by embracing the idea that learning is a process, not a onetime event. This book also discusses what it takes to lead to results, whether in a corporate, higher education, or consulting setting. Its contents will help you transition away from knowledge dumps to focus on the content and context of how people will be experiencing learning events. This book will also carefully tie the relationship of learning technologies to content development, and it will consider this topic from a less prescriptive approach, which will give you questions to ponder as you make choices. There is no one-size-fits-all approach.

From an actionable standpoint, use this book as a resource and work through the activities. One of the main activities will be crafting a 30/60/90-day plan to apply various concepts throughout. This can be done at a conceptual or summative level (or both). Chapters will include sample 30/60/90 plans, but the best action plans are those written by you because you know more about your individual situation. The provided 30/60/90 plans will be very high level, and I encourage you to consider them as guidance only. Additionally, we explore various questions throughout this book that should make you think hard about why you do what you do when it comes to creating learning experiences. These are meant for you to reflect on your own practices, deconstruct previous work, and consider how to transform it to an LXD approach. Finally, this book will share one of my favorite exercises that I learned a long time ago but still get utility from: the humble task analysis. Task analyses provide so much value; I'll share how a task analysis can help answer the questions of both content and context when creating learning experiences.

In the next chapter, and throughout this book, I want to make an argument for moving away from the content-driven approach that has plagued instructional design for decades and pivoting to a holistic approach that embraces both the content and the context. This approach, learning experience design, is the foundation of this book, and I hope to give you the tools and approaches that will help you design learning experiences with impact, whether you are a corporate, higher education, or consultant practitioner. Let's get started!

Chapter 1

What Is Learning Experience Design (LXD)?

In this chapter, we will explore:

- How learning experience design is operationalized
- Some capabilities of learning experience design

In the introduction, I outlined how my curiosity around job descriptions led me down the path to exploring learning experience design (LXD), which I anchored in engagement constructs. There has been an interest from many professionals across the broader learning and development field in exploring how user experience and instructional design overlap. Is that what learning experience design is?

I first heard the term *learning experience design* in 2016 while I was a staff member and graduate student at The Ohio State University. The first time I heard it, I wondered how it differed from *instructional design*. Then, in 2017, I became a founding member of the learning experience design research group at Ohio State, which explored the intersection of user experience and learning experiences. My friend and colleague, Ceren Korkmaz, took it a step further by researching and working in industrial design. Through a mini experiment, we lectured a group of industrial design students about learning experience design to see how they could apply their design expertise to building learning experiences. To say I was blown away with the final products would be an understatement.

Their attention to user research as well as their consideration of multiple types of end products inspired me to dig deeper. At the time, I

was a higher education instructional designer, an independent consultant, and a graduate student. The summer after that course, I landed a contract leading soft skills training courses with a large music industry client. I remember trying to dive into some more research around the user experience, but I was completely shot down and told to just crank out an e-learning module, take my money, and go. There had to be a better way.

Content and Context

So, is learning experience design the combination of what I call the OG instructional designer (or someone who does front-end analysis and curriculum development) and the e-learning developer? Some people would say yes. Part of the problem is that there isn't uniformity from organization to organization in how companies define the learning experience designer job. A good learning experience, which encompasses the entire campaign and not just a training session, also varies. Some organizations welcome the idea of learning experiences, while others refuse to change. To me, learning experience design is a holistic lens through which I see the way learning experiences are developed. It's not a "spray and pray" interaction; rather, it considers the intention of the content and how it will be used in the organization to design the best experience for that use. It's about not thinking that one learning experience equates mastery, but it's about considering how the content can be delivered in a way that gives users many opportunities to recall and apply the content while they perform their jobs. It's not assuming that people will be engaged via a drag-and-drop interaction; it's the knowledge, as Thiagi has said, that "engagement is in the mind, not the mouse."

What does this look like in the real world? Let's look at an example from my time as a training manager: An email came to me from a value stream manager who had made a PowerPoint presentation about preventing defects with a product our organization manufactured. The email stated that the manager would like us to upload the PowerPoint deck and assign it to everyone in the department for awareness. The organization was increasing the yield of this particular product, which was complicated

to manufacture due to a long cycle time. The PowerPoint presentation included several pictures of defects but no information about potential causes, no information on safeguards for prevention, and no information on what to do if a defect was detected. A team member reached out to the manager to set up a meeting to discuss the content further. When she did, it was like opening Pandora's box. She learned so much more about the department and their constraints—from staffing all the way to the lighting in the department's area, which could make it difficult for employees to see the defects. She asked what metrics the department was being held accountable for and found that a metric for measuring products that pass quality assurance the first time was poor. Could this content, if delivered in a way that supported the user, affect that metric? She got information on that metric from the organization's data repository and started to work. To build the curriculum, she included not only the manager but also the organization's engineers, frontline leadership in the department, and people who created the product. She uncovered some disagreement on the way the content was applied, but she masterfully put together a learning experience that made all the stakeholders happy and could help affect the metric.

The final product was a combination of:

- Scenario-based e-learning experiences
- Leadership talking points for stand-up meetings (different prompts to ask about how product creation is going and what types of defects are being seen, and to help bridge the communication gap between product creators and leadership)
- A company-wide, “spot the defect” contest, based on the e-learning program with a link to the technical document explaining the defects

You may be thinking, that sounds great but it will never work in my organization. I know the feeling! I'm not going to sugarcoat it; this was a challenge to roll out for several reasons:

1. People didn't understand what we were trying to do. They couldn't wrap their heads around something that wasn't a PowerPoint deck.

2. This took more time to execute when the stakeholder really wanted the team to upload the deck and assign it to everyone in the area so they could be aware of the defects. I countered that I was sure everyone in the department was already aware of defects. So what? How would they be supported in trying to prevent them?
3. After talking about the various causes of the defects, the manager realized that the lighting in his area was different from the area where the part inspectors worked, which could also contribute to the defect issues.

We will talk about needs assessments later, but imagine if we hadn't had this conversation. Who knows what would have happened? For too many organizations, training is a scapegoat for management failures and crummy culture. Training can't fix environmental factors or a culture with a lack of accountability. Training also doesn't fix conversations leaders are scared to have with their direct reports.

The LXD Capabilities

You may be struggling still to see how learning experience design is defined or applied. It's a lot of information to digest. I had a random "shower thought" one day about mapping capabilities of learning experience design, so I put out a call on LinkedIn to see if others would be interested. I was overwhelmed by the response and ended up connecting with a fellow learning leader, Jeffrey Horne, who was on a similar crusade with his organization, Edward Jones. While Horne's team had different aspects of their roles than the team I led at my organization, the collaboration and conversation was valuable. I was surprised at the amount of overlap we had on the capabilities. To help operationalize learning experience design, Figure 1-1 breaks the LXD capabilities into three buckets (strategic, applied, and core) to shape and define the work we do. Let's go in depth to explore each level.

Figure 1-1. Learning Experience Design Capabilities

Core LXD Capabilities

The core LXD capabilities are research, needs assessment, relationship management, learning science, and facilitation. To be a learning experience design practitioner, it is critical to have these capabilities because they provide a foundation for all the other capabilities. As folks continue to grow and master these core learning experience design capabilities, they will be able to check off the applied capabilities as well as the strategic capabilities.

Research

Often, people assume the word *research* means the academic sense. In the case of learning experience design, however, it means several other things. One is that you are willing to really dig deep for the learning experience. In the manufacturing example I shared, the learning experience designer knew that uploading a PowerPoint presentation into the LMS would at best waste people's time and at worst likely confuse them and do more harm than good. Research is critical to knowing the problem you are trying to solve and the population you are training and to creating

a learning experience that supports both. Additionally, it's beyond just the training course, whether it is an in-person session, a virtual instructor-led training course, or an e-learning module. In the research phase, dive deeper and consider how you can set people up for success from exploring a drip campaign of content using spaced retrieval to creating a list of talking points for leaders to use when speaking to employees about the content; far too often, with the pressures of departments, many folks skip this step. Over the years, I've learned the hard way that while subject matter experts (SMEs) have good intentions, oftentimes they don't have key pieces of information. I like doing a task analysis, which I'll discuss more in the chapters to come.

Needs Assessment

This is easily one of the most important parts of learning experience design, but it sadly gets overlooked frequently, especially by folks new to the work that we do. By a needs assessment, I mean the act of digging in to see if a learning experience is really the right answer to the problem. I know throughout my career I've been treated as a short-order cook with stakeholders demanding a training program and wanting it tomorrow. In some environments, I've been able to push back and approach conversations from a place of curiosity to help the stakeholder with a solution, but I've been in plenty of roles where I had no such autonomy. Now that I lead a team, I encourage everyone on the team to be thoughtful and intentional during this step. Don't assume that a learning experience is needed, but use the opportunity to be a partner with the business. Often, stakeholders are told training is needed, and they are in a hurry to set it up and go back to their jobs.

While needs assessments aren't new to instructional designers, learning experience design principles should encourage you to go deeper when performing a task analysis. User experience (UX) designers use many techniques to create more robust data that help inform your design choices. This includes user interviews, which can go beyond a typical stopgap of using SMEs, to really empathizing and learning what problems users face and how we can solve them. Additionally, UX designers dig

into a “day in the life” of users to consider factors that can also provide additional context of the problem. I’ll explore this more of this in chapters 4 and 5.

Relationship Management

It is critical for learning experiences to be built in partnerships. I’ll never forget one of the first emails I received when I was onboarding into a training manager role in a manufacturing setting. It was from the process engineering manager, who made an off-color comment about the current state of the training program. Instead of taking this comment negatively, I set up a meeting with him to talk. He quickly became one of my team’s biggest champions as we tried to change the way learning and development was done at the organization. Thinking back to many of my missteps when creating training courses, they often failed due to lack of clarity of the content or lack of buy-in from stakeholders. It is a precarious situation when you’re unsure how much to share. Also, depending on the organization, you may have the autonomy to manage your own project, or you may have a team project manager or an enterprise project management office. Dealing with people is fundamental to the success of any learning experience you build. If it weren’t for people, we wouldn’t have jobs. Imagine if robots took over the workforce; we’d have no one to train.

Learning Science

The incredible Clark Quinn (2021) argues that learning design is applied learning science, and I agree. If you are unable to design learning experiences to aid in the way that people learn, you are doing it wrong. In my opinion, this is a big reason why most higher education programs in learning and development are theory based; it is crucial for learning experience designers to understand the science behind learning. It’s an interesting continuum because while you may have great content, it’s possible to create the learning experience or produce it in a system that doesn’t use learning science to its advantage. In chapter 8, I’ll explore learning science as it pertains to learning technologies and how to implement them in your learning design process.

Facilitation

I heard Eddie Turner speak in 2018 about facilitation being the key to driving organizational change and business results, and it has stuck with me ever since. Thinking about learning experience design, isn't that exactly what we would like to do as well? *Facilitation* can be defined as the act of helping a group of people work together better, understand their common objectives, and plan how to achieve those objectives through various meetings or discussions. Whether it is working with subject matter experts or managing stakeholders' expectations, facilitation is key to learning experience design. It's a core capability because we often have a unique position in our organizations. We usually aren't on the front line, and we usually aren't in the C-suite. Because we are detached, we have the advantage of being able to ask questions we likely couldn't get away with otherwise. Facilitation skills allow us to be organizational detectives, and as you develop and mature in your facilitation style, you'll find that even the toughest exteriors can melt away when you can find common ground.

Reflection: Based on the outlined core capabilities, what do you think are your strengths and areas of opportunity?

Applied LXD Capabilities

The applied capabilities fall into seven buckets: experience design, accessibility and inclusion, project management, measurement, learning technologies, content design, and knowledge management. I wouldn't consider these capabilities for novices; although, you could easily specialize in any of these and have a robust career.

Experience Design

One of the most difficult tasks, especially for new designers, is to figure out the appropriate modality for the learning experience. Please note, I am not talking about learning styles here, but about how to determine what type of experience to create. While much of this book does refer to digital learning experiences, as someone who worked in manufacturing during the

pandemic, I believe that it's misguided to assume that everything needs a digital product. The population I served in manufacturing had varying levels of technical proficiency. As the organization grew and we welcomed new folks, almost every week I met someone who couldn't use a computer. This is no exaggeration. I'll never forget one person who lifted their mouse up and pointed the laser to the screen, thinking that was the way to use it. My heart broke; had I not seen it with my own eyes, I would not have believed it.

I've made learning experiences that were signs hung above urinals, alerts in an enterprise software system, instructor-led training sessions, or small group discussions. My point is that it takes a competent learning experience designer to know what type of training will be most effective and how. Is there something that folks just need to be aware of? If it doesn't require a full learning experience, I recommend using a communication medium. Is there a task that could cost someone their employment if they can't perform it? That sounds like a case for a performance test. There is no magic bullet—each situation is as unique as the organization and the people we serve. The way to get better is through experience, and I always recommend building a network of other learning and development professionals to support you on your journey.

Accessibility and Inclusion

As learning experience designers, it is our responsibility to make sure the experiences we create not only can be used by everyone but are also open, inclusive, and accessible to all.

This is especially true in our digital learning experiences. For example, media such as videos should have captions and transcripts. Any images in digital learning experiences should have alternative text, also called alt text, which provides a text description of the image. It's also important to consider including captions and transcripts for synchronous learning experiences such as virtual instructor-led training courses or in-person training sessions. Furthermore, doing extensive usability testing for our learning technologies, auditing our language for inclusion, and setting up our products to be accessible from the start (so we don't have to retrofit) are things that should be considered. The best

part of adding these elements is that they can be used by all, not just by people who may need additional support.

I will go into more depth about accessibility and inclusion in chapter 6, where I'll also discuss POUR, an acronym you should consider when creating learning experiences.

Project Management

Depending on the organization you work for, learning experiences may be managed by the learning designer or another group, such as a project manager in the learning and development function or by an enterprise specific project management office. For learning designers, managing projects can be tricky, especially if a lot of the work and follow-up needs to be done by others like subject matter experts or project sponsors.

The question that guides my project management philosophy is, “Who is doing what by when?” Often, this isn't as simple as it appears on the surface. The best learning experiences are always collaborative projects. Without the help of others through feedback and content, the learning experiences we create will not make an impact. Plus, stakeholder support can lead to better resources and buy-in across the organization. I will touch on a key component of project management, the scope agreement, in chapter 3.

Measurement

How do you know if your learning experience hit the mark? Often, learning experiences are created without specific metrics or key performance indicators in mind. Even worse, many experiences are created with no evaluation opportunity for the user to give us feedback; if there is an evaluation form, it may only ask questions that are superficial and provide no real indication of how users feel about the experience or if they can apply it to the work they do. While measurement often gets overlooked because it isn't as sexy as other elements of learning experience design, if you can't confidently say that you have provided users with practice opportunities in formative and summative assessments, what is the point of your learning experience? A content dump wastes users' time and costs the organization money. Additionally, how will you know if users were able to apply the content to

their jobs? Feedback is important, and far too often the wrong questions are asked. I will go into more detail about measurement chapter 10.

Learning Technologies

How important are the technologies that we use to create learning experiences? I'd argue that too often, if learning designers have access to a particular e-learning authoring tool, they will try to build experiences in that tool all the time. A learning experience designer who has experience with the applied capabilities, on the other hand, can count on having multiple tools in their toolbox. In other words, they can focus on the content and the action that users will take before trying to figure out how to build the experience with learning technologies. Sometimes all that is needed is a performance support update on an organization's intranet instead of pushing out a full course to everyone in the organization.

I will go into more detail about learning technologies in chapters 5 and 8.

Knowledge Management

As organizations mature in their understanding of how to do jobs and document learning experiences that help provide support, knowledge management is critical to help create order so documents can be found and maintained. I'll never forget the horror I experienced when I discovered that a company I worked for was using the learning management system as a dumping ground for PowerPoint decks, technical documents, and other items with no order around the metadata and no structure among the files. They had done this for years, and by the time I came along, there were too many fires that I didn't know how to put out. The key component of knowledge management is that nothing lasts forever, so we must create a system for updating and maintaining information. Also, people need to know how to find the things they need to do their jobs, so considering taxonomies is important.

Reflection: Based on the outlined applied capabilities, what are your strengths and areas of opportunity?

Strategic LXD Capabilities

The last grouping is filled with the strategic capabilities of agility, resource management, lifelong learning, and proactivity and reactivity. To me, the highest level capabilities and often set you up for success in a leadership role, although you certainly don't need to be in leadership to use them. These capabilities are out of scope of this book; however, I'll briefly touch on them here and explore them again when I talk about what it means to be an LXD champion.

Agility

The rapid pace of change in this space is something that attracts me to the work, but it can also be difficult to keep up with. I call out trends and innovation specifically because I see many professionals fall victim to savvy claims and seduction by shiny new objects. It's one thing to explore a trend, but it's another to know when to adopt it for your setting. Strategic learning experience designers know that while something may seem like a magic fix for their organization's problems, there's also great value in doing due diligence before implementation.

Resource Management

Not every member of your team will have the same skill levels as a learning leader, so it can be difficult to balance projects against available resources. People are complex, and when you factor in workplace politics, it can be extremely challenging to allocate the right resources to the right project. Do you partner your best person with the challenging subject matter expert, or do you give a stretch assignment or growth opportunity to a person who is struggling? These decisions often have to be made quickly, and there may be big consequences for making the wrong choice.

Lifelong Learning

Many people say they value lifelong learning but then fail to follow through. Go to LinkedIn right now, search "lifelong learning," and look how many people have that in their headline. Talk is cheap, and I love to ask this

question in job interviews: “How do you keep up with everything that goes on in learning and development?” I can tell very quickly when I’ve startled someone because they’ll give a vague answer like LinkedIn or blogs, so I clarify and ask for more specifics.

Lifelong learning is so important to me that I tell team members to get out there to learn and I block calendar time weekly for them to do so. Seeing what others are talking about or working on can influence your learning experiences, if not immediately then in the future. I’ve worked in learning and development for my entire professional career, and I still don’t know everything. That’s what I think I love most about this field; I believe that an expert can admit they still are learning and growing. Lifelong learning helps identify trends, which can also help inform innovations.

Proactivity vs. Reactivity

In most organizations I’ve worked for, projects have come to us. I haven’t had to “hit the pavement” to look for work. If we have functioning systems and are in positions where we have good partners, we should be able to be proactive in the work we do. When I led a team, in a previous role, I had strong relational equity with our information technology department. Having this was great because it not only helped with technology resources but gave me enough planning time to know about a large system change that was coming in six months. This afforded me the precious time I needed to get a plan in place and decide how to execute it. The system change was announced to the business about a month before it happened, and when my boss came to me with their pants on fire about the change, I could report that we already had a plan in motion.

Reflection: Based on the outlined strategic capabilities, what are your strengths and areas of opportunity?

Conclusion

Learning experience design is a way of creating learning experiences that focus on the content and the context of the system. LXD blends

elements of human performance, educational psychology, industrial and organizational psychology, learning technologies, and user experience design to make a learning experience that focuses on what a user needs to do with new information to be successful in their job. It's more than pushing content; it's about the intentionality of everything we do to craft a learning experience. In the next chapter, I'll walk through my learning experience design process.

30/60/90 Plan

As you look to incorporate pieces of this process in your own work, consider the following 30/60/90 plan. The best plans are made by you and are specific to your own situation. This generic template is intended to get you thinking about how to apply this plan to your work.

30 days: Explore your own definition of LXD and the LXD capabilities.

60 days: Identify one or two LXD capabilities you'd like to work on and gather resources.

90 days: Iterate and reflect on what worked and what hasn't.

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About the Author



Cara North is an award-winning learning experience design leader who has 15 years of experience across many sectors of learning and development. Throughout her career, Cara has worked in various industries including e-commerce, higher education, manufacturing, healthcare, and consulting. Her leadership experience includes serving as operations training manager for a manufacturing facility in the semiconductor sector and as director of learning and development for a healthcare technology startup.

As a first-generation college graduate, Cara is committed to the empowerment and upward mobility of others through education and service. Cara holds a bachelor's degree in broadcast journalism from the University of Kentucky, a master of workforce development from The Ohio State University, and has completed all her doctoral coursework in learning technologies at Ohio State. She serves as an adjunct faculty member at several institutions, including Boise State, Eastern Kentucky University, and Boston College, teaching courses ranging from professional social media networking to program evaluation. Cara also formally served on the admissions committee for the master of instructional design and development program at the University of Alabama at Birmingham.

She believes in service to others. As a past chapter president of the Central Ohio Chapter of ATD (COATD), she started two programs, including the Emerging Professional Showcase to give new professionals an opportunity to gain speaking experience and COATD Loves Columbus to help members give to a local charity at networking events.

Outside of work, Cara's two main hobbies may not seem like they go together. You'll usually find her playing video games or attending a class at Orangetheory Fitness. Cara and her partner Mathew live in the Columbus, Ohio area with their cat Bib Fortuna.

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Our customers and members work in public and private organizations in every industry sector. Since ATD was founded in 1943, the talent development field has expanded significantly to meet the needs of global businesses and emerging industries. Through the Talent Development Capability Model, education courses, certifications and credentials, memberships, industry-leading events, research, and publications, we help talent development professionals build their personal, professional, and organizational capabilities to meet new business demands with maximum impact and effectiveness.

One of the cornerstones of ATD's intellectual foundation, ATD Press offers insightful and practical information on talent development, training, and professional growth. ATD Press publications are written by industry thought leaders and offer anyone who works with adult learners the best practices, academic theory, and guidance necessary to move the profession forward.

We invite you to join our community. Learn more at [td.org](https://www.td.org).