BRANDON CARSON

L&D’s PLAYBOOK FOR THE DIGITAL AGE

FOREWORD BY BOB MOSHER

atd PRESS

Alexandria, VA
For Mom
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Foreword

By Bob Mosher

Standing still is not an option, and we can only imagine the disruptions ahead.
—DENIS POMBRIANT

We all recognize the central importance of technology and how it affects our businesses and our workforces. You could say this is an age of technological marvel—one that continues to bring a rapid revolution in the way we work, forever changing our expectations of that work and what it means. Out of this, the corporate learning industry finds itself on center stage, now a lead actor in this new movie with a serious role to play. There are heightened challenges, newfound responsibilities, and massive opportunities for L&D to enable the workforce to navigate this critical time and create real, measurable business value.

Critical challenges include:

• Understanding that the technology issues we face are broad and require L&D professionals to have, and maintain, a certain level of expertise.

• Understanding that technology alone does not guarantee the application of skills and increased performance of those whom L&D serves—applying new and innovative instructional design methodologies to a learning technology does.
Navigating and integrating the legacy, and often outdated, technologies that L&D has accumulated over the years is daunting and overdue. New responsibilities include:

- Addressing the complexity the digital age brings to the workforce.
- Researching and applying new instructional design methodologies to today’s workflow and every changing learning technology ecosystem.
- Considering adding new, or modifying existing, roles to an L&D team such as data scientist, performance consultant, and AI engineer, among other multidisciplinary competencies.
- Helping organizations redefine what the new workflow is, and will continue to evolve to, over the next several years.
- Adopting a performance-first mindset rather than one that defaults to training as the first, and often only, option.

We have so many opportunities in front of us as well:

- Rethinking long-distance collaboration.
- Increasing employee satisfaction by delivering more consumer-grade learning experiences.
- Moving into the workflow to deliver embedded moment-of-need deliverables, thus reducing the training footprint and cost and adding more direct value to the business.
- Rethinking antiquated learning design methodologies and replacing them with approaches that meet today’s ever-changing business landscape.
- Leading the way in technology adoption and accelerating its impact on performance and return on investment.

The 2020 COVID-19 pandemic became a game changer for everything. Most L&D operations find themselves permanently altering how they design and deliver learning solutions to their audiences. I’ve been in this industry for 37 years, and I’ve never seen demands placed on a learner like we’re seeing today. In the past several months I’ve heard less talk around creating instructor-led classes and e-learning, and more demand for how L&D can rise up and support a learner, and an organization, that finds itself navigating a volatile workflow environment like never before.
The conversation is more about supporting and enabling performance at an ever-changing moment, not upskilling someone so they can perform down the road. There is no “down the road” anymore. The need is now! It’s no longer what’s nice to know—it’s all about what you need to do. Waterfall design approaches are being exposed as more outdated than ever, and a three- to six-month turnaround time on a training deliverable is unacceptable and impractical in a time when the rules can change on an hourly basis. That scenario isn’t what L&D has traditionally planned for nor was built to deliver on. L&D needs a newer, agile, and pragmatic strategy that rewrites the rules and realigns the L&D team in a more appropriate and applicable way.

In this book, Brandon Carson builds on his perspective that the digital age is forever altering how business gets done, thereby changing the role corporate learning plays in delivering business value. He states that our primary challenge is not about the technology trends we see day-to-day, but more about the people on L&D teams and their capabilities, the decisions they make, the methodologies they use, and the strategies they formulate to continue to navigate this often blurry and never-before-seen acceleration. He calls for us to create a new “playbook” for L&D and walks us through how to assemble one that focuses on how we truly bring an applicable solution and measurable return to the workforce and the businesses we support. I’ve seen one of his playbooks, and I guarantee you’ll find value by digging into his approach.
Preface

You better start swimmin’ or you’ll sink like a stone for the times they are a-changin’.
—BOB DYLAN

In my first book, Learning in the Age of Immediacy: Five Factors for How We Connect, Communicate, and Get Work Done (2017), I explored how the digital transformation was impacting our world, our businesses, and the workforce. I described how technological convergence was beginning to affect every area of our lives and soon would alter not only how we got our work done but also how we define work itself. The acceleration in technology, business, and how we work has continued, and we are reaching a precipice where we must begin to rethink how we build workforce capability. Now more than ever, it’s critical for companies to have the best, most capable talent at every level.

In this new book, I call for a wholesale reorientation of the learning and development function based on the dynamic forces that are requiring us to accelerate how we acquire, develop, and retain the workforce of the future. The ideas I set forth here expand upon those in the last publication by outlining a new playbook for how to modernize the workplace learning function for the digital age.

I began writing this book before the 2020 COVID-19 pandemic unfolded, and my focus was sharply on how the digital age was changing our work lives. Although the pandemic inserted itself into our global narrative about life and work, the premise I was focused on became even more relevant—the technological convergence is a key component of how we will future-proof our
businesses and workforces. We must accelerate strategies to amplify the critical skills the workforce needs to perform through more innovative talent development strategies and through increased visibility and viability for the learning and development functions.

I’ve been in corporate learning for more than 20 years, and, like many tenured learning professionals, during that time I have witnessed transformations in how workers communicate, collaborate, and get things done. I’ve provided training solutions across modalities and leveraged new technologies, from classroom programs, laserdisc, and computer-based training (CBT) to the internet and almost everything in between. I’ve been a part of creating learning programs for as few as 25 people and as many as 400,000. I’ve been involved in creating learning strategies and implementing them across both small and large enterprises. This has required harnessing different methods to construct meaningful learning experiences and acquiring new skills and capabilities to do so. The shifts in our practice that have occurred over this time have been quite significant, and in some ways profound. We have one of the most complex tasks in the enterprise—building human capability. And the ways in which we do that have transformed more than once over the past few decades, requiring us to continuously learn and unlearn.

We know we can’t slow down the pace of progress or our race to discover new ways of working, but we must remain dedicated to keeping the humanity in work and keep a sharp focus on both the promise and peril of new technology. That’s just one reason why the learning and development function has almost overnight become one of the most important business strategies—the deciding factor in business surviving and thriving in the digital age comes down to the people making the decisions and getting the work done.
Introduction

For all human history, we have consistently sought new ways to communicate, collaborate, and share knowledge. The essence of humanity itself comes from our insatiable desire to share our wants, needs, and knowledge with each other. We designed language and built systems to store and retrieve information; we spread ideas and knowledge from person to person and place to place. Throughout time, we fostered advancement in technology to create new methods and systems of gaining, applying, and even augmenting our knowledge to expand the boundaries of our understanding. We leverage information to help us make better decisions and learn from the consequences of those decisions.

Wave after wave of innovation throughout time has resulted in improving the human condition and bringing greater well-being to society. The remarkable time in which we now live brings a technological convergence: In less than half a century, we have connected almost every person on earth to each other. The exponentially accelerating advancement and integration of technology into every aspect of our lives is generating fundamental changes in what it means to be human. We are the wealthiest we’ve ever been, even considering that economic inequality is rising; we have enjoyed one of the most peaceful generations in human history; and we are finding ways to use technology to redefine our societies, our businesses, and what it means to work and relax.

The Promise of the Digital Age

It’s been called the information age, the digital revolution, and the fourth industrial revolution. For this book and for the sake of simplicity, let’s refer to these times as the digital age. Regardless of what we call it, we are in an era of rapid acceleration, where a massive increase in the speed and complexity of business has fundamentally changed how we get work done. The next decade
is on pace to bring more change to the workplace than the last five decades combined. This upheaval brings opportunities to redefine not only how business is conducted, but also how we acquire, develop, and retain workers.

The end of Moore’s law (the principle that the speed and capability of computers can be expected to double every two years), the declining cost of computation, the explosion of data, and the evolution of technology have combined to exponentially change every aspect of how business now operates. But take a walk over to the corporate learning organization and see how it often relies on outdated technology and methods to operate. Why is this? Too many L&D functions are still focused on transactional interactions across a broad and complex portfolio while starved for resources. It’s time to reorient L&D and take a more proactive role in enabling the workforce, which must execute the business transformation that’s occurring. The accelerating dynamic of technology and its convergence requires us to reinvent the business of corporate learning by re-evaluating the structure, capabilities, and business model under which it operates.

As new technology is integrated, workers at all levels will be required to build capability much faster than before, navigating more complex systems and processes. Renewed focus must be placed on how to build new capability as every company pivots to digital strategies. L&D cannot afford to stand still. It needs to build a new framework for developing skills and capability across the workforce. L&D leaders must realize and share that L&D is one of the most critical business functions, and must be appropriately funded and resourced to realize the performance gains that are crucial to the business.

The digital age requires L&D to be a trusted partner with the business, but it’s not just the CLO or learning leader who’s accountable. With the realization that there is immense capability challenge across the enterprise, we need CEOs and senior leaders to lean in and understand that learning is a critical responsibility for the success of the enterprise, and that more investment in the L&D function is necessary. This inflection point requires us to reformulate not only our L&D strategies, but also the way in which we operate. In effect, we need a new L&D playbook for the digital age.
The New L&D Playbook

The 2020 pandemic almost immediately reshaped the world of work and in its wake created a paradigm shift for business. The need to support business continuity as well as the chaotic and confusing workplace challenges that quickly arose brought forward new imperatives for training operations. Many L&D teams found themselves needing to quickly pivot their operations around what I refer to as “the 3 Rs.” We’ll discuss these concepts more in later chapters. The 3 Rs are:

- **Reset** and adopt new rules for almost every aspect of designing and delivering learning experiences. Even through the crisis and initial chaos, training operations did not cease. For example, in highly compliance-driven industries, training is pivotal and must continue to ensure business continuity. Many teams found themselves needing to quickly create virtual training strategies when they were required to abandon in-person physical training.

- **Rethink** the roles on L&D teams and proactively assemble plans for increased digital learning, virtual facilitation, and coaching and mentoring.

- **Rebuild** L&D’s mission, vision, and operating principles with new responsibilities that reflect the evolving needs of the business and the workforce under new operating models.

The need for L&D to transform can be seen in how quickly the world of work has changed. The new L&D playbook will map out a plan for a fairer, more efficient, and highly productive labor market for the digital age. The playbook will reorient L&D to construct workforce development strategies that foster innovation, creativity, and leadership that are fundamental to business success. L&D leaders need to view the workforce as a complex but innately human system that operates as a network, where people will be required to thrive and survive in a world of ambiguity and complexity. The new L&D playbook will answer these questions:

- Where and what are the critical needs of the workforce today and over the next several years?
- What are the most pressing concerns for the L&D function today?
- How should L&D professionals support the digital transformation occurring across the business?
• How can we move L&D from being a cost-center function—where it’s often starved for resources and challenged to meet business and workforce needs—to presenting data-informed evidence on its contribution to the bottom line?

Constructing a new playbook will help formulate a strategic framework to enable the 3 Rs. During this process of reconstruction, it’s important to identify the underlying assumptions about how the business views L&D and, where necessary, challenge those assumptions. L&D must continually expect and prepare for constant change. We must begin to be comfortable with being uncomfortable, because we are challenged like no time in our past to provide business value. This is a time for courageous L&D leaders to succeed at formulating an L&D playbook that positions L&D properly as a catalyst for change.

**Why You Need This Book Now**

This book provides a template to create a new playbook to help L&D meet the changes the digital age brings to business. It’s also a call to action to address not just deficiencies in our operation, but to seize the myriad opportunities we have before us to positively affect the business and workforce we support. My hope is you can take the whole playbook or parts of it that are relevant to your situation and apply it in your organization. At the very least, I hope you can benefit from the concepts I discuss.

I begin by examining what got us here, with an overview of the three forces of the digital age, which include multiple technologies and societal shifts that are converging to bring us where we are today.

I then walk through the steps to take in formulating how a new playbook for L&D will reorient and prepare our practice for the challenges (both known and unknown) of the digital age, and I share why the L&D operating model needs to change based on these new workplace dynamics. Many of my industry colleagues have also weighed in, contributing case studies, examples, and their thoughtful perspectives that can further assist as you develop a practical strategy.

I conclude by reflecting on the major challenges we must overcome to ensure that technology’s enormous potential does, in fact, result in improved working conditions, greater employee well-being, and stronger, more profitable businesses.
The transformation L&D needs to bring about is radical and complex. But the alternative is a more unequal and unstable business and a workforce challenged to perform to changing business needs. Let’s recognize the central importance of a highly capable workforce and realize that L&D can no longer stand on the sidelines. It’s time for us to deliver true impact. It’s time for a new L&D playbook for the digital age.
References

Chapter 1


Chapter 2


**Chapter 3**


Chapter 4


About the Contributors

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Jeremy is founding director of Stanford University’s Virtual Human Interaction Lab and a co-founder of Strivr, an immersive learning platform company. Jeremy studies the psychology of virtual and augmented reality, in particular how virtual experiences lead to changes in perceptions of self and others. His Stanford lab builds and studies systems that allow people to meet in virtual space and explores the changes in the nature of social interaction. His most recent research focuses on how virtual experiences can transform education, environmental conservation, empathy, and health. He is also the author of *Experience On Demand: What Virtual Reality Is, How It Works, and What It Can Do.*

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Serena is an accomplished and recognized learning and talent development senior leader who thrives in fast paced and exploratory environments where her creative and intuitive leadership are highly valued. She is the head of talent for SoftwareONE’s Academy, a fellow of the Learning and Performance Institute, and currently also a doctoral candidate at Middlesex University, researching into the future of learning and the L&D function in technology accelerating organizations. Serena has operated globally and across cultures as head of internal learning functions, a management consultant for external clients, and as a service lead with client and revenue responsibility.

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Professional services. Over the past seven years, Suzanne has built a training team focused on transforming the skill sets needed during a time of radically changing technology in the world of data, AI, and machine learning. She spearheads innovative learning solutions to upskill the existing workforce and onboard new employees into the business. Her 20-year career at Bloomberg has spanned various business units. She has taught finance courses to employees globally, performed system audits for regulatory reporting on Bloomberg’s order management system and helped launch Bloomberg Intelligence, the company’s research division. Suzanne continues to be amazed and grateful that she’s working in the field of corporate training with a focus on digital upskilling. Her early career was in theatrical lighting design, and she likes to bring the world of creative theatrical production into the corporate setting to create well-produced, curated, and experiential programs for Bloomberg employees.

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Cher is an anthropologist, an organizational development practitioner, and a reticulist. Her work is the intersection of what’s possible for individuals and organizations. She has spent the last 20+ years building and leading teams in high-growth organizations. As a trusted advisor to boards and executive management teams, Cher advises leaders on creating a humane and healthy workplace to drive growth. She believes talent is a business challenge not an HR goal. Her expertise is advising organizations that are scaling or have reached an inflection point.

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Brandon Carson is an innovative learning strategist with extensive experience in creating global workforce development strategies in environments as varied as startups, technology companies, retail, and transportation. He is a popular speaker, delivering a wide variety of engaging presentations and workshops at industry events. Brandon has been honored with several industry awards, including the ATD BEST Award, the Learning Guild People’s Choice Award, and three Brandon Hall Awards for Best Custom Learning Design.

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Brandon Carson makes the case that it’s time for L&D to take a more proactive role in workforce development by creating a new framework for developing employee skills and capability. L&D leaders must embrace their role leading one of the most critical business functions: persuading CEOs that it must be funded and resourced to realize the performance gains that are crucial to the business.

In fact, L&D needs a new playbook to navigate the radical and complex transformation the digital age demands. In this volume, Carson walks through how to create a playbook to build alignment across the team and with stakeholders—whether it’s restructuring, new skilling, or rescoping—by being flexible as business needs change. He asks readers to adopt the language of business over the language of learning: For example, does your workforce repair aircraft or does it enable safe flight? In other words, can you be the visionary your organization requires?

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