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**Preface**

ATD’s Best On series is designed for today’s busy professionals who need a condensed resource to guide them through the highlights and cornerstones of a particular topic. Each volume is a collection of some of ATD’s top content from various publications, delivering an insightful and linear reference piece. This volume, ATD’s *Best On Mentoring*, features articles from *TD* magazine, full issues of *Infoline*, and chapters from ATD Press titles. Below are descriptions of these ATD publications.

**TD magazine (formerly T+D)**

For almost seven decades, *TD* magazine has covered the art and science of developing people and the systems in which they work to produce results. From the no-nonsense idealism of the 1940s and 1950s, through the social consciousness of the 1960s and 1970s, to the bottom-line thinking of the 1980s and 1990s, and on to the technological upheaval of the new millennium, *TD* magazine has been the voice of the profession.

As ATD’s monthly membership flagship publication, *TD*’s goals are to provide useful, how-to information on current best practices through case studies, share new technologies and their applications, report on emerging trends, and address issues that are relevant and pivotal to the field.

**TD at Work (formerly Infoline)**

Another monthly ATD publication for talent development professionals, *TD at Work* is a 16- to 24-page “booklet” with a practical bent. Each issue offers a fully immersive experience in a crucial topic in talent development, from designing e-learning to organizing training events. Written by seasoned experts and intended for all who work with adult learners, this short-format publication features easy-to-apply content and offers time-saving job aids, reading lists, and checklists that translate learning into practice.

**ATD Press**

ATD’s publishing arm, ATD Press, offers talent development professionals hundreds of titles on various industry topics. These books, written by respected leaders in talent development, provide content that highlights proven practices and advances the profession. From training design and delivery to e-learning and training technology to business and management titles, ATD Press has developed a robust repertoire of books that span ATD’s communities of practice.

ATD’s *Best On Mentoring* includes chapters from the following books:

- *Effective Management*, by A. Keith Barnes
- *Informal Learning Basics*, by Saul Carliner
- *Creating a Mentoring Program*, by Annabelle Reitman and Sylvia Ramirez Benatti
- *Employee Development on a Shoestring*, by Halelly Azulay
- *Modern Mentoring*, by Randy Emelo

ATD is pleased to present some of its best content on mentoring from its leading publications.
INTRODUCTION

In today’s global and collaborative workplace, learning is largely crowdsourced and talent development budgets are lean. This environment is ripe for one increasingly popular informal learning method—mentoring. As its name suggests, ATD’s Best On Mentoring provides the very best of ATD’s content on the topic of mentoring. This compilation includes TD magazine articles, Infoline issues, and ATD Press book chapters in four sections, outlined below.

Part I—Mentoring Fundamentals: Developing Employees Across the Organization
Kicking off this compilation, Effective Management by A. Keith Barnes offers 20 keys for managers to become instruments of change, with practical stories of a fictional leadership team illustrating each idea. Chapter 2, “Mentoring and Training,” describes mentoring as one of these vital practices that helps managers create a winning culture in their organizations.

Informal Learning Basics by Saul Carliner provides training and development professionals with guidance and practical lessons on harnessing the vast potential of informal learning in their organizations. And mentoring is one of those informal learning practices. Chapter 5, “Group Activities That Promote Informal Learning,” presents the case for mentoring as an effective employee development initiative for the entire organization.

“Mentoring to Develop Strategic Leaders” by Michael Miloff and Lois J. Zachary in the April 2012 issue of T+D takes a deeper dive into the fundamentals of mentoring—specifically its ability to build individual and organizational capability. For example, mentors can help to spur emotional intelligence, knowledge transfer, vision and focus, empowerment, process management skills, entrepreneurialism, and networking skills.

Part II—Mentoring Programs: Creating Formal Partnerships
Part II of this compilation is all about mentoring partnerships. Creating a Mentoring Program by Annabelle Reitman and Sylvia Ramirez Benatti presents the authors’ Mentoring Partnership Model, a way for new and seasoned employees to learn from one another. This book is a two-part presentation of how to implement the model: a facilitator’s handbook outlining the process and a participant’s workbook complete with worksheets and templates. Chapter 1, “Introduction,” and Chapter 2, “Overview of Model Format,” explain the characteristics of an effective mentor and why this particular model works. Chapter 3, “Mentoring Partnership Program Orientation,” describes how to form mentoring partnerships in your organization.

ASTD Handbook, 2nd Edition, edited by Elaine Biech, has been described as the most valuable resource you can own as a training and development professional. Written by 96 of the best and brightest thinkers in the field, the book’s 55 chapters cover everything you need to know about the profession today, including mentoring. Chip R. Bell writes about the topic in Chapter 39, “Mentoring: Building Partnerships for Learning.”

The June 2011 issue of T+D magazine concludes this section with a succinct mentoring case study, “Mentoring for the Millennials.” Written by ATD staff, the article illustrates how employees at one real-world organization used reverse mentoring to create a space where they could be heard, learned about themselves and the organization, and gained practical tools to use on the job.
“Tools for Effective Mentoring Programs,” the December 2011 Infoline by Cynthia Way, Beverly Kaye, Devon Scheef, Susan Thomas, and Patricia Douglas, is an ideal resource for mentoring best practices. It presents how-to strategies that readers can adapt to create an effective mentoring program in their organization. Tips and job aids on mentoring are included, plus practical tools and information. These techniques aid readers with planning and developing mentorship guidelines, making effective matches, determining mentor and mentee roles and responsibilities, and evaluating a mentoring program.

Employee Development on a Shoestring by Halelly Azulay is another hands-on resource that delivers specific implementation techniques for developing motivated, engaged employees in today’s “do more with less” business environment. A handy toolkit for any employee developer, this book provides templates and detailed guidelines to help busy managers develop their workforce in a way that is tailored to each employee without breaking the bank. Chapter 5, “Two Can Do It: Learning by Mentoring or Being Mentored,” provides general employee development best practices and in-depth how-to specifics on mentoring.

“Seven Success Strategies for Mentoring Program Managers,” by Lois J. Zachary in the February 2015 issue of TD, addresses mentoring program managers (MPM). These individuals charged with the responsibility of coordinating and overseeing organizational mentoring efforts often do not make time for their own development and learning. The article provides seven learning and development opportunities that are guaranteed to make MPMs more successful in their role, followed by questions to consider relative to those opportunities.

Part IV—Mentoring for the 21st-Century Workplace: The Future of Collaborative Learning
The final part of this compilation includes two chapters from the popular ATD title Modern Mentoring, by Randy Emelo. This book offers a blueprint for success with a model that benefits more than the select few and steers clear of forcing connections between people. Emelo demonstrates that a culture in which people choose what they want to learn and from whom they learn, while increasing overall organizational intelligence, is completely within reach. Chapter 1, “Don’t Put Mentoring in a Box,” debunks some myths about traditional mentoring and advocates for a more progressive approach to this practice. Chapter 7, “Peer-to-Peer Learning in Mentoring Networks,” explains how modern mentoring plays out in social learning and collaboration.

Based on the ideas from the previous book chapters, the September 2013 Infoline is a succinct conclusion to the concept of modern mentoring. “Creating a Modern Mentoring Culture,” also by Randy Emelo, outlines the key pillars of modern mentoring, discusses the individual and organizational benefits of putting this type of social learning and mentoring program in place for your multigenerational workforce, and offers practical advice and guidelines for creating and implementing a modern mentoring culture.

Nothing says “21st-century workplace” like the integration of technology and adult learning. The concluding piece in this compilation is “Tech-Infused Mentoring” by Judy Corner, from the June 2012 issue of T+D. It shows how online mentoring technology can offer an efficient solution for the challenges of implementing and managing a successful program and describes best practices for use with these virtual platforms.
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PART I:

MENTORING FUNDAMENTALS: DEVELOPING EMPLOYEES ACROSS THE ORGANIZATION
A. Keith Barnes served as the S. V. Hunsaker Professor of Management at the University of Redlands in Southern California from 1984 to 1999, where he won awards for teaching and service. He authored the academic book *Management Maturity: Prerequisite to Total Quality Management* and more than 60 articles and monographs on a wide variety of business subjects. Before becoming an academic, he was a senior executive with the J. I. Case Company, which was then a part of the Fortune 500 Company Tenneco Inc.
Chapter 2

Mentoring and Training

If you ask any successful person if they made it entirely on their own merits without help and guidance from one or more special people—particularly when they were young—you’d find most are willing to acknowledge the role of mentors in their progress.

There may be exceptions, but I have not encountered one. People need guidance to stretch and grow, to develop a sense of progress as they strive to reach their potentials. They need encouragement and support. They need role models and yes, they need genuine mentors.

What is a mentor? The dictionary definition does not do justice to this important concept, describing it merely as “a wise and trusted counselor,” so let me specify what mentors must do for their protégés.
A mentor:

❖ makes you feel worthwhile by *rewarding achievement*  
(praise is a form of reward)

❖ helps you increasingly become *aware of your strengths*

❖ finds ways for you to stretch and *grow through encouragement*

❖ *never lets you down*, personally or professionally.

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On the subject of praise—an important form of reward—the first hugely successful nonacademic book on effective management (Hershey and Blanchard’s *The One Minute Manager*, 1980) was based entirely on the importance of finding some reason to praise people. These authors recommended finding people doing good work and praising them openly for it. This is an oversimplification, yes, but it’s of great value nonetheless. Their little book remains one of the all-time best sellers on management.

The foregoing prescriptions for mentoring present a tall order, right? Yes they do, and yet any one of us can mentor another individual if we start with the right assumptions.

**First** and foremost, there is no manipulation involved. You must be sincere.

**Second**, any praise for undeserved achievement will produce negative results and weaken the potential benefits that might accrue from well-deserved praise.
**Third**, do not expect miracles. Depending on the personalities of both parties, guidance can be accepted fully or rejected, especially at first—until trust is built. But guidance efforts can also be misinterpreted, so (as with all relationships) allow the trust to build slowly.

**Fourth**, allow the mentoring relationship to fail if it goes nowhere. Walk away and let someone else give it a try (see chapter 6 on dealing with underperformers).

If you are in a leadership role in your organization, you must be willing to mentor others—but do not push it on an unwilling protégé. Similarly, seek mentoring yourself from those with more experience than you, but only if there is apparent willingness on their part.

Interdependencies exist in all human situations. Functional interdependencies of people working together for common purposes are not the only ones that have significance, however. Those of a more personal nature are also critical. The experienced worker must share their learning with those less seasoned, and this can be done openly and effectively even without genuine mentoring taking place; it happens routinely in all but the most dysfunctional settings. But mentoring carries this process several steps further. Mentoring ensures the maximum benefit for the protégé, but it also engenders a culture that is open, organic, and vibrant (see chapter 11 on mismatches for more on this).

**Training**—different from mentoring—is equally critical to developing your people and to ensuring their continued growth. Not every individual desires to take on more and more responsibility—and that is natural enough—but virtually everyone wants to become more
proficient at what they do. It is one way of ensuring job security, for one thing, and increasing earnings for another, but it also has an even more profound benefit: It instills a sense of fulfillment.

Technical training that people need to do their jobs is often done well, I find; but all too often the trainers forget one vital thing about learning—it takes place inside the learner’s brain.

I tell my students that they can learn nothing from me. I mean it! No, I do not consider myself a poor teacher, but I do know how people learn. It is a process the learner goes through internally. It is how information is processed by the learner that determines the efficacy of the learning process. Two students hear the same lecture. One listens and hears but is passive. The other listens, challenges what he hears or blends it with what he already knows, reflects on it, and compares it with related or similar information. Perhaps he allows the new information to replace the old—or he decides to think on it more—but he is actively involved in a process of discovery, of growth and enlightenment, of change. It is the trainer’s job to facilitate change: to be a change agent, in fact.

Some kinds of training require specific outcomes. A certain thing should be done in a specific way. For example, if you are training to be an airline pilot there are many specific steps to be taken for safety—if nothing else—and in a specific sequence. But mostly training merely desires a certain outcome, the specific methods and steps being less critical. So concentrate on desired outcomes and if someone asks why something must be done a certain way, make sure your answer is not “because I say so,” or worse, “because that is always the way we have
done it.” There is nothing more soul-destroying than bureaucratic nonsense, and it leads to demoralization.

People who invent their own methods for reaching a desirable outcome tend to be more enthusiastic about their job than those given no flexibility, but make sure there is an appropriate match between an individual’s ability and preparation (see chapter 10 for more on this subject).

Illustration

This true story illustrates my point on the current topic. I was in a middle-management position, years ago, and I often worked late. Almost every evening as I was leaving, I would say goodnight to the cleaning crew, who worked through the night. Old Joe, an amiable fellow, supervised the cleaners and always had a cheery word. I noticed that he applied wax to the terrazzo floor of our lobby every day. I asked him if it was really necessary to wax that floor so often.

“Sure is, Mr. B.,” he said. “The floor wax we use just don’t hold up well, and too many people scuff their feet as they pass through here during the day.”

“You’d think there would be a product that would stand up better,” I said. (This was in the days before advanced polymers.)

“Oh, there is,” Joe said. “But it’s too expensive. The boss man says we have to use this stuff. Looks good when I’m done, though, don’t it? So not my problem.”
If Joe knew there were better products, and if a better product led to less frequent waxing, wouldn’t it be worth trying? Maybe the overall expense would actually decrease? I said nothing of these thoughts to Joe and left him with a kind word.

The next day I spoke to our controller (he oversaw the cleaning crew) and I told him of my exchange with Joe. “Why not let Joe have the freedom to choose his materials and judge the results on an overall basis?” I said. “First cost isn’t everything, as you well know.”

A few days later I ran into Joe in a hardware store. We exchanged a few pleasantries and he asked, “Did you say something to Mr. Sanders, about my terrazzo floor?”

“No, why?”

“Well, the damnedest thing. He told me to find a better product, said I would be free to use whatever I thought best, and he gave me an annual budget. Not just for floor wax, but for all our cleaning materials. I believe I can save the company some money and get better results. What do you think of that, Mr. B.?”

“Just great,” I said. “But just be sure that floor looks good all the time, Joe.”

“Oh, I will. I’m in here checking out all kinds of things that’ll make our jobs easier and get better results.” He paused, looking pensive. “You sure you didn’t say something?”

Joe had been given some freedoms. He now felt more like one of the team.
Though the benefits of delegation are illustrated in the above true story, here is an important caution: Do not deal with this on a piecemeal basis. At every level, and in every function, personnel need to feel the encouragement and inclusion that Joe felt. The importance of a winning culture is in the shared, even-handed approaches that exist throughout. Treat the whole as a team! Each member of the team has a different role to play, but each must feel as though her contribution is vital to goal attainment of the whole. This culture must be evident and pervasive! (But see chapter 19 on the subject of maturity, and chapter 10 on the subject of matchups.)

As for training of the other kind—aimed at improving personal interaction with customers and other employees, or having to do with nontechnical issues—the right approach is to have the best performers do the training on the job, day to day, rather than in a formal setting. This is not to say that a classroom session or two is out of the question, but frankly, hands-on, on-site job training is far superior to any other. And it’s ideal in most circumstances. But watch out for personality clashes and the possibility of a domineering individual ruining the learning process. Mature people can deal with pompous and heavy-handed trainers up to a point. But choose your trainers wisely. They can make or break the learning process in all kinds of quirky ways.

Finally, before the next topic, let me say that education and training are very different things. And yet they are too often confused and abused. Training aims at modifying and shaping specific behaviors, whereas education primarily focuses on overall growth, and changing
understanding, which can then result in many self-initiated changes in behavior.

Set specific standards for your training objectives. If you want regimented performances from people, make certain you know why that is critical. If, however, varied approaches are acceptable in your situation, then focus on outcomes training or even on education, which induces involvement and commitment.

*Training* is the patterning of individual behaviors of a certain kind, whereas *education* is a process of growth that leads individuals to develop their own understandings and apply such individually to their work and to every aspect of their lives. Many jobs require people who are trained and educated. Be sure you understand these aspects thoroughly. Apply them logically and fairly.
A Day in the Life of Gerry and John...

Several days passed, and a new sales representative had been hired. John and Gerry were discussing their current challenges over coffee in Gerry’s office. Topics varied from the trivial (like a leaky roof in the parts area, causing some products to be damaged), to the more serious issue of the still-needed new office manager. Several applicants had been interviewed for the critical post, but all seemed to lack the necessary experience in this particular industry.

“I liked that guy, what’s his name…Henderson?” John said.

“Yeah. His experience is close, so I could train him, but he seemed abrasive to me. Know what I mean? We have a congenial office, and I don’t want to upset people.”

John grunted an assent, and said: “Speaking of training, my new sales guy needs training badly; I get the feeling he’s been used to having more freedom to manage his own activities than I am comfortable with. As you know, I run a pretty tight ship, and I want to see sales call reports each day, and expense reports no later than Monday morning each week. And he’s starting to irritate me with his little hints about needing more freedom, like ‘Selling is an individual sport, Johnny.’ Calls me ‘Johnny’ all the time. Sounds like my mother!”

“Just tell him to stop. I had a boss once who called me ‘Gerry-Boy.’ Had to cut him off at the knees.” Gerry laughed. “Has he spent any time with Sergio yet?”
Sergio Talbot was their longest serving sales rep. He had his own quirks, but he was a reliable and reasonably productive salesman who knew the product line better than anyone. He also had a history of adhering perfectly to all of John’s required procedures and the bureaucratic formalities of the job. His sales levels were modest, but everyone liked him.

“I really don’t want Sergio training him, Gerry. Sergio and I have had a few spats lately, mostly over his call reports but there are other things. As you know, I made it easy by accepting reports twice a week. They all have a laptop or a notebook, you know, but I suspect Sergio is not using his to communicate. He might be moonlighting or something. Not sure what he’s up to, but at this stage of the game I’m not convinced he’s as committed as he once was. As you know, his numbers are down.”

“Yes, I know they are. Any other problems with him?”

“Well, yeah. He gripes about me not showing enough encouragement and appreciation.”

“What did you say to that?”

“I reminded him his numbers are down. He’s an old pro, Gerry; shouldn’t need to be treated with kid gloves. He’s made good money with us over the years; a couple of times more than me! His annual performance review is coming up, so I’ll get things straight with him.”

Gerry grunted. “Listen, John, I have another candidate coming in any minute. You available to meet with her after I’m done? On paper she looks promising.”

“Do I have to, Gerry? I’m kinda busy, and you know more about the needs in administration than I do.”

“It wouldn’t hurt to get a second opinion, John.”

“All right…give me a buzz when you’re done.”
INFORMAL LEARNING BASICS

“Group Activities That Promote Informal Learning”

Saul Carliner

Saul Carliner is director of the Education Doctoral Program and an associate professor at Concordia University in Montreal. His research and teaching focus on the design of emerging forms of online learning and communication for the workplace, and management issues that arise when producing these materials. Also an industry consultant, he has provided strategic planning and evaluation services for organizations in Africa, Asia, Australia, North America, and Europe, including Alltel Wireless, AT&T, Equitas, IBM, Microsoft, ST Microelectronics Turkish Management Centre, Wachovia, and several U.S. and Canadian government agencies. Among 150 articles and seven other books are the bestselling Training Design Basics and Designing E-Learning, and award-winning E-Learning Handbook (with Patti Shank).
Group Activities That Promote Informal Learning

What’s Inside This Chapter
In this chapter, you’ll learn about

- the social nature of informal learning
- ways that people learn informally through others, at events and during interactions with other workers.

Unlike the first four chapters of this book, the next several chapters combine the elements of a text and a reference. The first sections of these chapters briefly introduce concepts; the later sections describe specific ways to apply the concepts. You might review the later sections briefly now, then refer back to them later, when you plan to use a particular type of informal learning.
The Social Nature of Learning
To consider informal learning in groups, think back to Curtis and Marley. Both had interactions that helped them learn informally on the job:

- Curtis, the site supervisor for a construction firm, lost his first supervisory position because he fired a worker without authorization. When the situation arose that led Curtis to fire the worker, he remembered something that one of his colleagues had mentioned during an off-site managers’ meeting: Managers had a responsibility to deal effectively with safety violations, especially when the employee is at fault. This message led Curtis to misinterpret the company policy.

- Marley, the once-unfocused junior account executive with an advertising agency, became an expert in business-to-business sales through the guidance of her mentor. Through a series of discussions and “what if” situations, her mentor helped her recognize her lack of focus and hone her skills in landing business-to-business advertising accounts.

Learning in both of these instances resulted from interactions with others: In Curtis’s case, with his colleagues in a meeting, and in Marley’s case, through ongoing conversations with her increasingly trusted mentor.

Social Learning: A Phenomenon Rooted in a Philosophy of Learning
As noted in chapter 2, some definitions of learning describe it as a change in behavior. In such instances, learners succeed when they adopt the behaviors defined in the learning objectives. Training and development professionals write these objectives and state them in terms that are observable and measurable so that they can track the extent to which learning has occurred. But not all learning happens according to a script. Learning can also be influenced by the cultural environment of the workplace and the personal values each worker brings to it. Consider Curtis again. Although he works as a construction manager during the day, he also owns and works a hobby farm. Because he owns the farm he does not need permission to implement his decisions and can resolve issues immediately as he sees fit. That is the context for his feeling empowered to fire a worker who repeatedly flaunted the safety rules. A training and development professional could not have been aware of this background, but it affects how the worker integrates knowledge all the same.

Similarly, Marley had difficulty focusing in her job because her business degree curriculum had overwhelmingly focused on consumer advertising. Although her employer had
some consumer accounts, the majority of work came from business-to-business accounts. So previous learning experiences unintentionally favored consumer over business-to-business accounts and, faced with the mixed message of the lessons she learned before joining the firm and those learned afterward, Marley had difficulty focusing.

These two examples illustrate how workers construct their base of knowledge through social interactions—some inside the workplace, some outside of it. Some educational philosophers believe that the behaviorist and the pure cognitivist approaches to learning (described in chapters 1 and 2) overlook these social and situational influences. They propose constructivist learning, which acknowledges these influences and suggests that instructors promote learning through social interactions and powerful experiences.

This constructivist approach to learning underlies much informal learning, especially learning under learner control. Training and development professionals can anticipate outcomes from a constructivist learning approach, but not necessarily predict them, as they can in behaviorist or cognitivist approaches to learning. One of the resulting challenges to training and development professionals is identifying the types of group interactions that facilitate learning, anticipating what types of positive and negative lessons workers might learn from those interactions, and influencing those interactions when possible to promote learning—whatever form the outcome ultimately takes.

Two general sets of group interactions promote learning in collaboration with others:

- Events, which refer to formally scheduled activities. Specific types of events include formal courses, lunch and learns, meetings, seminars, and symposia, conferences, and webinars.
- Interactions with others, through either formally structured groups and projects or loosely structured networks. Specific types of interactions with others include coaching, communities, mentoring, networks, peer learning, and work assignments and projects.

Many of these types of group interactions already exist in organizations. Informal learning tends to work most effectively when it leverages existing opportunities rather than creating new ones. When promoting informal learning in collaboration with others, pay attention to the following conditions and suggestions for success:
Group Activities That Promote Informal Learning

- Match the learning opportunity with the appropriate phase in the life cycle of a job.
- Help participants in an activity recognize its potential for learning.
- Make sure that participants have the resources they need to learn when engaged in that activity; this might involve preparing materials to accompany the activity.
- Provide participants with tools for identifying lessons learned and transferring them to the job.

The next two sections describe several specific types of events and interactions with others that offer informal learning opportunities. The lists are not exhaustive but provide an overview of the most common opportunities and ways that you can leverage them for informal learning.

Events That Support Informal Learning

The following sections describe four specific types of events that contribute to informal learning, suggest when and how you might use them, and how they adjust the levers of informal learning.

Formal Courses

As ironic as this might sound, formal courses provide informal learning experiences because they can help workers achieve personal learning objectives or address developmental needs. Formal courses are also *synchronous*, meaning that the instructor and learners all participate at the same time. So participants have the opportunity to interact with other participants and, in the process, experience additional learning opportunities to those named in the course description. Typically, these types of formal courses support informal learning:

- training courses offered by employers, professional associations, and trade associations
- programs offered outside of a formal training program and often not offering any credit, such as
  - continuing education programs offered by public schools, colleges, and universities
  - courses offered by museums, health-related organizations, and other community organizations.
Success with integrating formal courses into an informal learning program depends on participants’ abilities to link the formal classroom learning to their personal informal learning agendas. This requires excellent synthesis skills—the ability to see connections in material that, at first glance, might not have a relationship.

Training and development professionals can support informal learning through formal courses by advising workers when a formal course might help them meet a personal learning goal (especially one offered outside the organization) and by suggesting how the course helps meet these goals if workers do not see the connection.

Training and development professionals can also advocate for organizational support for participation in these courses, either by providing work time to learn, funds, or both. When support is not provided and workers would significantly benefit from the learning experience, training and development professionals might encourage workers to invest their own resources in these courses. Figure 5–1 suggests how formal courses adjust the levers of informal learning.

**Figure 5–1. How Formal Courses Contribute to Informal Learning**

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructors and administrators typically control the learning process.</td>
<td>Formal courses, especially classroom courses, occur in classrooms, meeting rooms, and similar places intended for learning.</td>
<td>Although the primary purpose of formal courses is learning, participants who have an informal agenda might see the formal agenda as secondary to their purposes.</td>
<td>Content varies, from abstract to technical, related to a practical, everyday skill.</td>
<td>Although participants will likely be conscious of learning the formal objectives, they may or may not be fully conscious of learning that occurs in groups and activities.</td>
</tr>
</tbody>
</table>
Lunch and Learns

“Lunch and learn” refers to an event of 90 minutes or less that occurs over a meal (typically lunch, hence the name) and during which participants discuss technical or developmental content. For example, an HR department might plan an event to discuss balancing work and personal lives—and might provide sandwiches and beverages to encourage workers to attend.

Although lunch-and-learn sessions rarely have formal learning objectives, they usually have a tight focus on a single topic and are kept brief. A designated organizer invites speakers and participants, coaches speakers to provide meaningful content to participants, introduces the speakers at the event, suggests ways workers can apply the content in their jobs, and thanks speakers and participants afterward. Training and development professionals are usually the designated organizer and facilitator of these events. They can further support informal learning through lunch and learns by linking the topic of a session with the goals and interests of participants and by suggesting ways that workers can continue their exploration of the topic back on the job. Figure 5–2 suggests how lunch and learns adjust the levers of informal learning.

Figure 5–2. How Lunch and Learns Contribute to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
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<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agendas for lunch and learns are usually coordinated by a facilitator and are often driven by that person.</td>
<td>Although lunch and learns usually occur in a meeting room or classroom (traditional or virtual), they can really occur anywhere, such as a corner of a cafeteria or a coffeehouse.</td>
<td>Learning is usually the primary purpose of the event, but networking and team relationships often serve a strong secondary purpose.</td>
<td>Content varies, from abstract to technical, related to a practical, everyday skill. The nature of the content varies by common characteristic of the participants.</td>
<td>Although participants will likely be conscious of learning the formal objectives, they may or may not be fully conscious of learning that occurs in groups and activities.</td>
</tr>
</tbody>
</table>
Group Activities That Promote Informal Learning

Meetings
Although people rarely call meetings for the specific purpose of learning, many workers find meetings to be one of the most important means of learning because participants share and discuss key information about current assignments. Effective meetings usually start with a clearly defined purpose and have a formal agenda that participants can expect to cover in the given time. Effective meetings are also announced well in advance, provide participants with reminders about the meetings, and are appropriately documented. Appropriate documentation refers to notes (sometimes called minutes) that record decisions made, key information shared, responsibilities assigned, and dates when those people must report back on their responsibilities. Most importantly, effective meetings have leaders who take responsibility for each of these issues.

Training and development professionals can support meetings as learning opportunities in several ways. They can provide guidance to meeting leaders so that meetings run efficiently and stay on topic and workers feel motivated to participate in meetings. Training and development professionals can also provide job aids that help meeting leaders establish agendas and record notes, and they can coach meeting leaders on ways to keep meetings focused, while allowing for exploration of unanticipated but important points of learning that may arise. For example, training and development professionals might suggest ending each meeting with a discussion of lessons learned or a debriefing of the meeting process. Figure 5–3 suggests how meetings specifically adjust the levers of informal learning.
Figure 5–3. How Meetings Contribute to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informal</td>
<td>Many meetings occur in places intended for learning, but many others occur in places intended for socializing.</td>
<td>Learning is a secondary objective of most meetings.</td>
<td>Although much meeting content is technical, much learning content is developmental.</td>
<td>Although participants expect to learn about the technical content related to the purpose of the meeting, much of the actual learning is unconscious.</td>
</tr>
</tbody>
</table>

Seminars, Symposia, Conferences, and Webinars

Seminars, symposia, conferences, and webinars are special types of meetings that let participants explore one or more topics of interest. Most of these events have facilitators. Organizations often sponsor these events to update the knowledge and skills of current staff members and business partners (such as suppliers and customers). Organizations prefer these events because they are often shorter than a full training course, let participants tailor an agenda to their own needs and interests, or let participants consider a topic in depth.

Each of these events has a particular style and focus:

- Seminars (sometimes called lectures) are usually one- to three-hour events that explore one topic in depth. Seminars typically include one or more guest speakers who share knowledge and spark thought, and they often include interaction between the audience and speaker and among members of the audience.
- Symposia have a single focus, but it is usually broader than that of a seminar and explored from a variety of perspectives. Most symposia only have one
event running at a time and might last from one to several days. Most symposia also include related events, such as meals and receptions, for participants to casually interact with—and learn from—one another. Conferences are about the same length as symposia, but usually have a broader focus and schedule several simultaneous events. Like symposia, conferences include less structured events for participants to casually interact with—and learn from—one another.

Although webinars get their name by combining web with seminar, webinars have come to refer to seminars, symposia, and conferences held online.

Although seminars, symposia, and conferences are all formally scheduled events, many training and development professionals consider them forms of informal learning.

The success of these events depends on two general factors. The first is prepared speakers who address topics of interest to participants—in ways that engage the participants, through clear, succinct messages, well-designed slides, and similar visual aids.

The other key characteristic of successful seminars, symposia, conferences, and webinars is having plenty of opportunities for participants to learn from one another (called peer learning). This involves ensuring that speakers lead participants in interactive activities (more than merely leaving time at the end of a presentation for participants to ask questions). Such facilitated activities ensure that all participants are engaged. Training and development professionals often need to coach speakers to effectively present material and engage their audiences.

In addition to planning these events so that they promote various types of learning, training and development professionals can provide support for seminars, symposia, and conferences by advising workers about upcoming events of interest and encouraging them to participate. Training and development professionals can also advocate for organizations to support workers’ participation in these events and provide resources that help workers reflect on their learning after the event. Figure 5–4 suggests how seminars, symposia, conferences, and webinars adjust the levers of informal learning.
Figure 5–4. How Seminars, Symposia, Conferences, and Webinars Contribute to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>The event and its agenda are formally structured by the planners of the event. But because the scheduled sessions and social events let participants interact with speakers, participants control part of their agendas.</td>
<td>The presentations at these events usually occur in spaces intended for learning (such as meeting rooms and classrooms). But these events usually include social events in other places. For example, one year, ASTD held an event for one of its conferences at Universal Studios in Orlando.</td>
<td>Learning is a primary purpose of these events.</td>
<td>The planners of these events and speakers determine the content that is formally presented; discussion points from the participants steer the learning in other directions.</td>
<td>Participants are conscious of learning related to the stated goals of the event, and some, though not all, of the learning occurs through interactions with speakers and other participants.</td>
</tr>
</tbody>
</table>

Interactions With Others That Promote Informal Learning

Planned and unplanned interactions with others are the second of two categories of opportunities that promote or support informal learning in the workplace. The following sections explore six types of interactions with others that contribute to informal learning.
Coaching

The term “coaching” refers to formal efforts to provide workers with feedback on their performance of a particular task or job and, if needed, suggestions on how to improve that performance. Coaching relationships typically involve two parties: workers, who perform a job or task, and coaches, who provide the feedback and suggestions. This individualized, tailored feedback can provide workers with unusually deep insights rooted in a particular situation (a teachable moment) and linked to their own knowledge and experience.

Using Technology in Coaching Efforts

Technology helps organizations provide workers with feedback on their performance. In certain environments, such as manufacturing and telemarketing, technology tracks the amount of work performed, the time needed to perform it, the number of errors, and similar types of information. This type of feedback provides workers with quantitative feedback on their performance. Project management systems provide project teams with similar types of feedback on development projects. More sophisticated technology can provide intelligent tutoring—anticipating questions and providing responses based on what task the user is performing at a given moment. For example, some language-learning websites let learners practice conversations, but the conversations occur between the learner and the computer. The computer chooses responses based on the words of the learner.

Software that allows people to communicate with one another also provides a means of sharing feedback, even when the workers involved do not sit near one another. For example, many professional, certified coaches have clients who live beyond the metropolitan area in which the coach lives. These coaches typically interact with workers through telephones and virtual meeting software.

Training and development professionals can support coaching by raising awareness among managers and others that they serve a coaching role; many of these people have limited awareness of, or comfort with, this role. They can also provide managers and others who serve in a coaching role with guidance in how to coach, focusing on the types of issues to raise—and the ones to let go—and how to effectively provide feedback. Figure 5–5 suggests how coaching adjusts the levers of informal learning.
### Figure 5–5. How Coaching Contributes to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coaching is initiated by observations of performance in the workplace, or by a request from a worker for guidance in improving performance.</td>
<td>Coaching occurs in the workplace, a private office or meeting room, or some similar location not exclusively intended for learning.</td>
<td>Coaching in the context of a specific job tells workers how their performance can more closely match standards established by the organization. Other types of coaching often assists with similar goals.</td>
<td>The organization establishes the standards against which coaches assess performance in immediate jobs. For longer term coaching, the focus is more developmental.</td>
<td>Workers are usually conscious that they are learning.</td>
</tr>
</tbody>
</table>

### Communities

Communities refer to groups of people who share a professional interest or background and discuss opportunities, challenges, and feelings related to it. Communities can meet in person or online (or a combination of the two).

Clubs, chambers of commerce, professional associations, and affinity groups (people who share a common demographic characteristic or interest) are typical examples of professional communities that meet in person. Most of these groups meet on a regular basis—weekly, monthly, or quarterly—and build their regular meetings around a meal, guest speaker, or social event. An ASTD chapter is an example of such a community.

Online communities bring together people online who might not otherwise have the opportunity to interact. For example, the website LinkedIn lets professionals...
build communities with people outside of their organizations and professions, and lets members form “groups” to discuss common interests. Online communities typically exist in one of these formats:

- Listservs, communities in which people interact through email messages. Participants formally register with a listserv and then receive messages sent by other members of the community and reply to those messages. Listservs are among the earliest forms of online communities.
- Message boards, also called forums, in which people visit a website, read comments posted by members of the community, and post responses to those comments. Message boards are key components of many learning management systems (like Plateau) and course management systems (like Blackboard and Moodle). Some message boards restrict membership; others are open to anyone.
- Discussion groups, which are similar to message boards, but are integrated into social networking sites like Facebook and LinkedIn, and often have easier-to-use interfaces than message boards.

Training and development professionals can support communities by establishing them and inviting eligible workers to participate, planning the first events (if any) and “seeding” discussions during crucial early months. But as many learn through experience, the majority of the support effort needed for a community occurs after it is initially established. Keeping the conversation going in the long term requires sustained attention to the community, ongoing assessment of the needs and interests of community members, and providing information and programming that meets those needs.

Although volunteers assume these responsibilities in some communities, in many others, volunteers do not rise to the task. So in some communities, training and development professionals fill these gaps and monitor discussions among members of the community to make sure that the discussions follow guidelines established for the community and users respect the integrity of each community member. Research—like the early work of Lee Sproull and Sara Kiesler (1991)—suggests that online contributors are often less sensitive to etiquette than they are in person. Figure 5–6 suggests how communities adjust the levers of informal learning.
Mentoring

Mentoring refers to a relationship between a mentor—someone with experience who “provides advice, guidance, support, and feedback” (Driscoll and Carliner, 2005, p. 188)—and a protégé, someone who wants to learn from the experience of the mentor. Mentoring relationships “facilitate personal and professional growth, and . . . foster career development” (Driscoll and Carliner, p. 188).
Mentoring contrasts with coaching in that mentoring is often provided outside the context of a job, is intended for the personal development of the protégé, and has no formal agenda unless the protégé suggests one. In contrast, coaching is usually provided within the context of a particular job with the intention of improving performance in that job.

Mentoring relationships nurture workers in a variety of ways, including these:

- Mentors help protégés develop strategies for advancing their careers and for addressing immediate challenges in their workplaces. For example, a mentor might advise a protégé about developmental opportunities that might benefit the protégé for a future career opportunity. Mentors might also introduce protégés to their contacts.
- Mentors collaborate with protégés on work projects. Regardless of whether the mentor or the protégé initiates the project, the protégé typically apprentices with the mentor.
- Mentors serve as role models; protégés use the examples of their mentors in establishing career goals and charting career paths.

Although mentoring tends to focus on the development of the protégé, it also serves as a powerful learning experience for the mentor. Many mentors note that, in addition to valued relationships, they develop coaching and leadership skills through mentoring. Sometimes the protégé helps the mentor develop skills, which is called reverse mentoring. (This arrangement works especially well with technology, with which younger protégés tend to have higher comfort levels.) Mentoring can happen in person or online. Software that operates like online dating software can match mentors and protégés who might not have met otherwise. The relationship continues thorough email, social networking, Skype, and similar types of software.

Mentoring can occur formally or informally. Informal mentoring often results from chance meetings or prior connections. Formal mentoring results from the efforts of an employer or some similar organization to establish a mentoring program. Many of these programs merely involve matching potential mentors and protégés. Ideally the match is based on shared interests or characteristics, but the match sometimes results from the willingness of a person to serve as a mentor to someone else. As a result, formally established mentoring relationships often have disappointing results.
Group Activities That Promote Informal Learning

Training and development professionals can support mentoring by facilitating the match of potential mentors with protégés and by helping set the expectations of both parties at the beginning of the relationship so both have realistic expectations of it. In addition, training and development professionals can support mentoring by acting as a mediator if problems arise in the relationships between mentors and protégés. Figure 5–7 suggests how mentoring adjust the levers of informal learning.

Figure 5–7. How Mentoring Contributes to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>The mentoring process is generally controlled by the learner.</td>
<td>Mentoring typically occurs in social settings, for example, in restaurants, coffeehouses, or offices, or through telephone or online chats.</td>
<td>Mentoring serves both learning and developmental purposes.</td>
<td>Typical mentoring focuses on developmental issues, but occasionally addresses technical and everyday issues.</td>
<td>In some instances, participants are conscious that learning is occurring; in others, they only realize much later that learning has occurred.</td>
</tr>
</tbody>
</table>

Networks

Networks refer to the complex web of people whom a worker contacts when questions arise and he or she is looking for information and advice on work- or career-related topics. With the rise of social media such as blogs, Facebook, LinkedIn, social bookmarking tools, and Twitter, these networks increasingly include people from outside the geographic community.

Some have dubbed these online networks as personal learning networks. Blogger Kate Klingensmith (2009) defined them as “the entire collection of people with whom you engage and exchange information, usually online. Personal Learning Networks, or PLNs, have been around forever. Originally, they were your family and
friends, maybe other educators you worked with, but as the Internet and web 2.0 tools have become nearly ubiquitous, PLNs can include tons of different communities—social networking sites like Facebook, blogs, Twitter, wikis, social bookmarking tools, LinkedIn, and so many more.”

Although most current writing focuses on the role of technology in building and supporting networks, some of the most significant factors in building and nurturing them are interpersonal processes. Workers need to feel comfortable contacting people when questions arise. Comfort levels vary with perceptions of authority (or lack of authority) and personality differences (introversion or extroversion). Similarly, members of the network must have a general respect for one another, or they may dismiss comments from other members.

Networks primarily contribute to informal learning in these ways:

- offering immediate answers to pressing questions
- inspiring new perspectives on, and ideas about, a subject, either by broadening the scope of a subject or by adding depth to the understanding of it
- suggesting new topics about which to learn
- modeling behavior for interacting in communities; by observing the behavior of others in the network, workers get a sense of both dos and don’ts for interacting in professional and organizational settings.

Training and development professionals can support the formation of networks in much the same way that they promote communities. In addition, they can encourage workers to include people in their networks who do not work for their organization, so that workers have access to the broadest possible base of knowledge and experiences—and ensure that organizations support workers in networking outside their organizations (a concern in some organizations). Training and development professionals have the option, too, of playing “matchmaker,” suggesting people that workers might include in their networks. Figure 5–8 suggests how networks adjust the levers of informal learning.

**Peer Learning**

*Peer learning* refers to a class of activities in which people who share a status in the organization or community work together to develop their knowledge, skills, and attitudes from interactions with each other.
Peer learning takes several forms. One of the best known is the book group, in which people who share the status of interested readers all read the same book and then meet to discuss it. Although most people consider book groups to be a social activity, some workplaces have formal and informal groups whose primary purpose is sharing and reading books. Another of the best known forms of peer learning is the water cooler conversation, in which co-workers share valuable information during an impromptu gathering in the office.

Although peer learning has a long tradition in face-to-face formats, online communication has transformed the experience. Social networking applications provide peers who would not otherwise meet with the opportunity to interact. Before online communication, factors such as geography and location in the organizational hierarchy would have prevented these people from interacting with—and learning from—one another. Unlike the formal groups on social networking applications, peer learning opportunities often result from contact initiated by an individual—such as one LinkedIn member contacting three or four others to establish a short-term group to study a project. The discussion would continue over email, in a meeting (virtual or in person), or with the exchange of documents.

Although peer learning groups need not have formal learning objectives, having a well-defined purpose helps the group decide which activities they will choose to
Group Activities That Promote Informal Learning

pursue and which ones they will not. The success of peer groups depends on a number of factors, including access to expertise and resources and a willingness to engage in honest conversation and dialogue.

Strong group processes, too, are essential to the success of peer learning. Because team members learn from one another, the group processes need to provide everyone an equal opportunity to speak and promote respect for all opinions expressed.

Training and development professionals support peer learning by promoting all types of work-related interactions among co-workers and by helping workers realize what they might have learned through these interactions. Training and development professionals also need to advocate for peer learning with senior management, making them aware that conversations around the water cooler might start with discussions of the latest sports event or American Idol episode, but often meander to work-related topics and to resolutions of problems and improvement of productivity. Figure 5–9 suggests how peer learning adjusts the levers of informal learning.

Figure 5–9. How Peer Learning Contributes to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants control all aspects of their learning process.</td>
<td>Participants can choose where they meet to learn. Some might choose less formal settings, like cubicles, coffeeshops, or restaurants, while others tend to choose meeting rooms and classrooms.</td>
<td>Learning groups have learning as a primary focus. In many instances, however, the learning on the agenda (such as a particular book) often differs from the deep learning that occurs (such as insights into one another and interacting with people).</td>
<td>The nature of the content varies widely, depending on the specific agenda of the group, as well as the nature of the discussions. But even formally established goals range from technical to developmental content.</td>
<td>In terms of the stated reasons for the peer group, learning tends to occur consciously. But as noted earlier, much unexpected learning occurs, and that often happens unconsciously.</td>
</tr>
</tbody>
</table>
Work Assignments and Projects

Work assignments and projects refer to situations in which informal learning occurs through the process of workers performing their jobs. These assignments and projects often provide some of the most significant learning opportunities because workers learn and do simultaneously. In fact, others who have written about informal learning, such as Marilyn Laiken and her colleagues at the University of Toronto, often focus on this incidental learning that occurs within the context of people performing their jobs.

Several factors make work assignments and projects valuable learning experiences. One is that the lessons learned have immediate relevance to a particular work project. Another is the institutional history that some team members offer to the individual or work group—history that might not otherwise be available and puts immediate work into a larger context.

Although learning through work assignments and projects can offer positive, indeed transformational, learning experiences, the learning can just as easily result from a combination of less-than-satisfying work experiences. Benign neglect by one group of workers—such as failing to document a change in a procedure—can result in unexpected learning by another group of workers. The latter group of workers might feel that the experience that caused rework could have been avoided.

One of the primary ways that training and development professionals can support learning through work assignments and projects is by helping workers realize that learning has occurred and identifying what they have learned. Researcher Victoria Marsick refers to this as “surfacing” unconscious learning. Typically, managers and co-workers have the responsibility for “surfacing” this learning, but training and development professionals can further these efforts by providing managers and co-workers with interview scripts and other means of eliciting learning. Figure 5–10 suggests how team work assignments and projects adjust the levers of informal learning.
Group Activities That Promote Informal Learning

Figure 5–10. How Work Assignments and Projects Contribute to Informal Learning

<table>
<thead>
<tr>
<th>Process</th>
<th>Location</th>
<th>Purpose</th>
<th>Content</th>
<th>Consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informal</td>
<td>Informal</td>
<td>Learning occurs in the workplace.</td>
<td>Workers learn all types of content through work assignments and projects. In some instances, they develop and hone technical skills related to the work. In other instances, workers learn more abstract content, such as concepts guiding the work and how to finesse challenging situations.</td>
<td>When workers are primarily focused on the work at hand, many do not realize that any learning has occurred.</td>
</tr>
<tr>
<td>Informal</td>
<td>Formal</td>
<td>Learning is a secondary purpose of most work assignments and projects, except for assignments specifically identified as developmental, such as apprenticeships, internships, and training rotations.</td>
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<tr>
<td>Informal</td>
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<td>Informal</td>
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</tbody>
</table>

A Note About Group Activities and Informal Learning

Each type of event and interaction with others described in this chapter contributes to informal learning. As presented in the figures showing the levers of learning, however, these types of informal learning require shared responsibilities for, and participation in, learning between workers and their organizations. Workers are not left on their own to learn.
Group Activities That Promote Informal Learning

Because the two parties share responsibility for learning, neither really controls learning. For those transitioning from formal to informal learning, that has profound implications:

- Objectives often do not exist and, when they do, might be quite broad and not expressed in observable and measurable terms.
- Even with these more loosely defined objectives, the lessons actually learned may or may not relate to them.
- Learners or circumstances often determine when learning is complete; evaluation is optional and often does not formally occur.
- When workers do share what they have learned, the specific lessons each individual takes from the experience are unique because each worker integrates those lessons in ways that relate to their own circumstances, previous knowledge, and current needs.

This personalization of informal learning is particularly powerful, and individualized learning experiences play as significant a role in informal learning as ones shared with groups. The next chapter explores individual opportunities for informal learning.

**Getting It Done**

Much informal learning supports the social approach to learning described in this chapter. Some definitions of learning describe it as a “change in behavior,” in which learners succeed in their efforts when they adopt behaviors defined in the learning objectives. This definition is rooted in a behaviorist (and, to some extent, cognitivist) view of learning.

But learning often happens as a result of interactions with other people and cultures, which results in the construction of an individual basis of knowledge that is as rooted in culture and context as it is in behaviors. This constructivist approach to learning, as educators call it, underlies much informal learning. Under such views, learning is more than a change in behavior; it is also a change in knowledge, attitudes, perspectives, and, perhaps, beliefs—and the results are not always predictable.

Use Table 5–1 to determine which types of group activities might meet particular informal learning needs of workers in your organization at each phase during the life cycles of their jobs.
<table>
<thead>
<tr>
<th>Orient workers to the technical aspects of a job</th>
<th>Onboard workers to the culture and values of the group</th>
<th>Expand the scope of assignments a worker can handle</th>
<th>Build workers’ proficiency</th>
<th>Help workers address undocumented challenges</th>
<th>Update workers’ skills and knowledge</th>
<th>Help workers choose career goals</th>
<th>Prepare workers for their next jobs</th>
<th>Address ongoing initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coaching</td>
<td>Communities</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Communities</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
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<tr>
<td>Formal courses</td>
<td>Meetings</td>
<td>Communities</td>
<td>Communities</td>
<td>Formal courses</td>
<td>Communities</td>
<td>Communities</td>
<td>Formal courses</td>
<td>Communities</td>
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<tr>
<td>On-the-job training (OJT)</td>
<td>Networks</td>
<td>Lunch and learns</td>
<td>Lunch and learns</td>
<td>Networks</td>
<td>Lunch and learns</td>
<td>Networks</td>
<td>Lunch and learns</td>
<td>Lunch and learns</td>
</tr>
<tr>
<td>Peer learning</td>
<td>Seminars, symposia, conferences, and webinars</td>
<td>On-the-job training (OJT)</td>
<td>Meetings</td>
<td>Networks</td>
<td>Meetings</td>
<td>Networks</td>
<td>On-the-job training (OJT)</td>
<td>Meetings</td>
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<tr>
<td>Peer learning</td>
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<td>Peer learning</td>
<td>Peer learning</td>
<td>Seminars, symposia, conferences, and webinars</td>
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<td>Seminars, symposia, conferences, and webinars</td>
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</table>

Table 5.1. Group Activities That Promote Informal Learning at Different Phases in the Life Cycle of a Job

How might you support informal learning through group activities in your organization? Try these exercises to find out.

1. Billy, who works as a business analyst for a major defense contractor, has responsibility for upgrading content management systems in his organization. He recently saw a conference in Las Vegas that looks like it should provide him with the background he needs to advise his company on future work with these systems, and he asks his manager for work time to travel to the conference, as well as financial support. Because the manager believes that people who attend conferences in Las Vegas spend all of their time in the casinos, the initial reaction is a resounding “No.”

What could the manager do to ensure that Billy has a meaningful conference experience?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

Debriefing of exercise 1: If the manager says yes, Billy might not go to the casinos. He might go to the shows and for a tour of Hoover Dam. (Just kidding.)

The manager can act in these ways as a facilitator to help Billy get the most out of the conference:

• The manager might ask Billy to provide a list of goals for the conference and then ask which sessions might help Billy meet those goals.
• Because implementing content management systems poses numerous challenges—from integrating the software into an internal network to adapting work processes so people distribute material through the system rather than through email—networking plays a significant role in the conference. Billy might identify, in advance, networking opportunities that exist.
• After the conference, the manager might ask Billy either to write a report explaining how he will apply what he has learned at the conference or to deliver a presentation to the rest of the staff with insights gained from the conference—or both.
2. Mozart Publishers (a fictional company) wanted to develop an application for iPads and Android devices through which people could access their magazines online. Mozart publishes 10 magazines but has decided to pilot the effort with just two of them. Anna, the director in charge of the project, recognized that much learning would occur during this project: new technology, new means of delivering content, new ways of writing and presenting material, new means of charging readers and advertisers, and new means of promoting the magazine. Anna did not want any aspect of this learning to go to waste.

So what could she do to capture the learning?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Debriefing of exercise 2: At the least, Anna could create a repository with all project-related materials, such as project proposals, projections, and plans—and revisions to all of them, as well as status reports and other correspondence, and source files for each piece and version of the project.

At the most, Anna might conduct debriefings following key milestones. The debriefings should strive for a balanced view—identifying both what worked and what could be improved (and how)—and should cover each aspect of the project: technical, editorial, financial, marketing, and results. Someone should record the key points in the conversations and include them with the project files.

After the project is complete, Anna might conduct a project postmortem, which would explore the project in its entirety. Like the debriefings at each milestone, the project postmortem should strive for a balanced view—identifying both what worked and what could be improved (and how)—and should cover each aspect of the project: technical, editorial, financial, marketing, and results. In addition, the project postmortem might contain specific recommendations for future projects regarding the process, procedures, technology, content, and business model.