ARCHITECTURE RECOMENDATION

L5 Root Cause Coaching

Overview

Currently the L5 program is comprised of various skills and topics aligned to general "pillars". The number of aligned topics and skills vary from pillar to pillar, and some topics and skills are far more popular and relevant than others. These more popular offerings are not only available through the L5 offerings, but also often required learnings for onboarding programs. Examples include Root Cause Coaching, Practice Plans, Connecting Intentionally, and Prioritization. While the squad has many recommendations around the larger L5 experience, we have been asked to focus on a repeatable, scalable experience based on the test-case of Root Cause Coaching.

Existing State

Currently there are three modalities, i.e. formats, that learners can use to develop their L5 skills. These are comprised of Skills on Demand video playlists, Degreed Pathways, and live/recorded workshop offerings. Once initially created, these assets are not regularly reviewed/updated unless a ticket is raised to address something specific.

There are inconsistent approaches to each modality, some modalities are less popular than others, data collection for evaluation is extremely limited, and the re-use of these assets is not tracked from a content management standpoint, resulting in minor tweaks being made in one place/asset and not others. Additionally, no action items, assessment, or activities are used in L5 offerings, making it very knowledge focused. We have also found that learners and coaches tend to prioritize quick-hit Skills on Demand playlists while leaning on Degreed pathways for accessing templates and workbooks, then primarily attending workshop sessions and recordings when they are highlighted/communicated as new or timely. The existing L5 learning approach is also very open and self-led and difficult to track progress or prior completions, and leaders frequently ask for a more directive pathway for L5 skill development (PI Learning: Leadership Development, 2023).

Leaders and coaches appreciate that there are multiple modalities available, providing learners choice and voice in how they access material, per adult learning theory best practices (Indeed, 2022). They also appreciate visual representations of the larger L5 landscape (e.g. Placemats) that allow them to quickly explore what topics and skills are covered within the L5, which supports the andragogical assumption of providing sequential activities alongside helping learners select learning based on their specific needs and interests (American Institutes for Research: Department of Education TEAL Center, 2011)). Lastly, the L5 skills are a core component of the Leadership Impact performance management system, making it a priority for leaders to continue to leverage to learn and grow. This interconnection with performance goals helps support alignment to the adult learning principle of providing directly relevant motivation for learning (Indeed, 2022).

Root Cause Coaching currently has a Degreed Pathway, Skills on Demand playlist, and a recorded workshop session. The content in each of these assets varies in the type of information provided, examples, key terms used, and examples, however there is also a fair amount of duplication, especially in the Degreed Pathway which leverages videos and documents from across the PI Distribution landscape.

Ideal State

In an ideal state, L5 would consist of offerings that are focused on scaffolded skill development, allow leaders to participate in a variety of modalities, allow the squad/ coaches/ leaders to track progress, and help leaders keep track of what they have completed and what they may work through next while also maintaining a variety of modalities for engagement, a visual representation of the skill-development journey, and reinforcing the connection between learning the skill and performance.

Root Cause Coaching Requirements

- Apply research-based, transformational coaching strategies to your leadership practice
- Evaluate the level of readiness of associates to adapt coaching approaches
- Improve the quality of the associate coaching experience

While the test case is focused on Root Cause Coaching due to its frequent use, breadth of modalities used, shared ownership across Leadership Development programs, and completeness of existing resources, the following are not only reflective of the test case but also the objectives, outcomes, and requirements for all refreshed L5 experiences.

Program Objectives and Outcomes

Accessible through Elevate	Leaders know where to go to find the desired content and can intuitively access applicable skill they need to learn. Any leader can take the training when needed. Coaches can recommend the solution and know where and how to find it.
The experience is intuitive and immersive using modern technology to allow learners to engage with the system for practice and repetition	Leaders can engage with the content to repetitively practice the skill, receive feedback, and track their own learning progress.
Scalable process and deliverable (for future redesigns) and solutions (across Coaching and PI Distribution audience)	PI Learning can use the solution to create additional skill development experiences to leverage learner schemas and mental models for consistency

Learning Objectives

Apply research-based, transformational coaching strategies to your leadership practice	Leaders have asked for strategies and support to immediately apply new learnings to their practice.
Evaluate the level of readiness of associates to adapt coaching approaches	Leaders need to not only be able to implement Root Cause Coaching but also better understand how to adapt their approach to best help their associates.
Improve the quality of the associate coaching experience	As part of Leadership Impact evergreen goals, we want to make sure that we are connecting one specific, granular skill/practice to the larger outcome of Associate Success.

Requirements

The Leadership Development Squad will incorporate the following design tenets and Helios principles in the architecture and design of the new L5 learning experience:

Modern & Innovative	Select modalities and applicable platforms that will engage learners and incorporate adult learning methodologies and principles
Centralized	Centrally available within the L5 section of Elevate; Saved to content server/ Artemis;
Scalable	Selected platform(s) can be integrated into LMS, Tableau, web-based analytics, etc.; Available and applicable across multiple leader roles (aspiring, new, tenured, experienced) and journeys; able to be duplicated and applied by the learning squad/design team to other skills; documented and cadenced maintenance plan created and used

Personalized	Where possible, learners are provided voice and choice per adult learning principles to personalize their learning experience through customized case studies, activities, and examples.
Modularized	Designed in a way that can stand alone or be grouped with other content
Immersive	Build in activities, immersion, collaboration/submission, assessments, ratings
Collaborative	Created in close collaboration with identified RCCs
Easy UX – Intuitive/engaging	Centrally located, searchable on Elevate; consistent approach and branding to leverage and build Leadership Development schemas; developed in a tool(s) that offer interactive and visually appealing features; approved program logos and colors applied
"Coach-Friendly"	Opportunities for coaching, observation, and connection incorporated into the learning experience; ideally incorporated into/ closely connected to additional coaching tools and dashboards (My Development Planner, L5 SPT, Salesforce Coaching App)
Learners know where they are on their journey and what to do next- (Learning Journey Awareness)	Aligned to leader journey, associate coaching use-cases; ideally incorporated into My Development Planner; L5 developed with a more guided/linear approach overall
Data rich with measurable success metrics	Assessment and interactions able to be collected and evaluated; tool(s) capable of gathering reliable and valid learning and interaction data; Effectiveness and applicability measurements; integrate completion data into Leadership Development dashboard
Incorporates Helios Design Standards	Enterprise-wide design principles are incorporated to ensure adherence to Fidelity ecosystem standards (Human First, Simplified, Cohesive, Conversational, Modular, Tailored, Omni Channel)

Proposed Wireframes

Wireframe A: Rise

Summary

Using Rise will meet all requirements (Appendix A). Benefits are that it will be streamlined for design and development, provide a highly consistent experience, and provide clean and simple interactions that are easy to navigate. Rise would also be best for long-form text content and linking out to/embedding other asset types, such as FidVid videos. The drawbacks are that it is less customizable and interactive than Storyline and would have fewer capabilities for data collection if xAPI capabilities come to fruition in PI Learning.

Wireframe

While content in the Rise wireframe is generic placeholder text, the structural components provide a look into initial thinking on the architecture of the learning experience. A course structure is proposed to allow learners to visually see their progress and navigate around the course without many clicks, as opposed to the microlearning option which is more limited. This approach also gives the learning a more course-like look and feel, helping activate existing learner schemas around common components and expectations and providing a more formal, professional experience, aligning to leader sentiments around ideal learning experiences (PI Learning: Leadership Development, 2023).

Within the course there are six lessons, which would be templated to support consistency and scalability. It begins with a short introduction that activates learner's perceptions of relevancy and value, aligning to the adult learning principles that adult learners want to know how information and training is directly relevant and immediately applicable (Indeed, 2022). This lesson would also include an interactive journey map (for either L5 progress, pillar progress, or skill-specific progress) to help learners understand their learning journey and anticipate what will come next.

To align to Enterprise learning terminology as well as leverage existing learner mental models, the next three lessons are structured by: "Learning the Basics", which would be primarily knowledge building; "Beyond the Basics", which would introduce realistic applications of knowledge and skill; and "Advanced Concepts", which would focus on external learning and resources, open-ended reflective prompts, and relevant skillsets that pair well with the core skill of the training (Fidelity Enterprise). These lessons would

have a common structure of an introduction, inclusion of leader sentiments, a variety of media types, at least one interactive component, and at least one practical application exercise. Practical application will not only help learners practice in a low-stakes environment, but also provide immediate feedback in a self-paced offering, making this a scalable way to support learners without taxing coaches, mentors, and facilitators time. This approach also supports learning science practices such as scaffolding, repetition, and activating prior knowledge (Eberly Center: Teching Excellence & Educational Innovation).

Following the three content-bearing lessons would be a formal knowledge check. This not only provides learners with an opportunity to check their understanding of key concepts based on identified learning outcomes, but also provides the squad with learning data that can inform improvements, additional learning opportunities, and completion data, helping better inform business decisions, priorities, and best practices (Eberly Center: Teching Excellence & Educational Innovation). This knowledge check would be designed to require a 70% or higher score to move forward to the final lesson to ensure completion requires intentionality and understanding.

The course would finish with a summary that includes a downloadable certificate that can be shared with others to market the learning to internal networks and attached to development plans; a short summary of the ask, achieved outcomes, and skills acquired alongside reminders to update relevant coaching and observation tools. It would also provide easy access to key resources from throughout the course and solicit learner feedback to inform future improvements.

Wireframe B: Storyline

Summary

Using Rise will meet all requirements (Appendix B). Benefits are that it would provide more opportunities for meaningful interactions for learners, emphasize bite-sized portions and concise language, and provide a more customizable learning experience. Drawbacks are that it is more complex to design and build, currently has fewer data points available for evaluation, and would require significant refinement of third-party resources and long-form text-based content.

Wireframe

The material in the Storyline wireframe is a blend of real content and placeholder media. Storyline is highly customizable, but to ensure both an impactful learning experience and a reasonable return on investment for the squad it is recommended that a template be created and used, and a menu be available upon publishing to allow learners to move about the experience. This tool would align well to leader sentiments around short, high-impact experiences to make the most of their time alongside providing a highly engaging, modern look and feel (PI Learning: Leadership Development, 2023).

The experience would begin with a brief overview of what the skill is, why it is directly relevant, and how the learning experience will help the learner, aligning to the adult learning principles that adult learners want to know how information and training is directly relevant and immediately applicable. Authentic examples and leader sentiments would also be at the forefront to reinforce the value and relevancy while also adding in a personal touch (Indeed, 2022).

The experience would be chunked into "Chapters", beginning with the overview described above before moving into a scaffolded approach leveraging existing Enterprise schemas of "The Basics", "Beyond the Basics", and "Advanced Topics". There would be multiple "slides" within each of these chunks to provide sufficient space to introduce knowledge, provide examples, and present interactive practice opportunities. Due to the level of customization available, interactive components and activities would be designed to incorporate reflection, provide immediate feedback, and clearly lend to the next topic. To align to best practices in scaffolding as well as Enterprise standards, The Basics would focus on initial knowledge development, Beyond the Basics would introduce key skills and direct applications of the skill, and Advanced Concepts would go beyond the core components to suggest next steps to master the skill through additional related offerings (Fidelity Enterprise).

The final chunk of this approach would summarize the learning, emphasize newly acquired skillsets, provide key resources (such as templates), and direct learners to take immediate action to support skill reinforcement (Indeed, 2022).

Due to the nature of Storyline the focus of these chunks would be direct application and interactive practice as opposed to providing a place to provide detailed long-form content. This tool also is not as effective in pausing and returning later, making it essential that entire offering take no more than twenty minutes to ensure focus and impact, as studies show that attention spans significantly decrease after twenty minutes (The Internet Pathology Laboratory).

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Appendix

A: Rise Requirement Alignments

Rise provides learners with an intuitive course-like experience. It is easily deployed, scaled, and maintained while also being quick to create and edit from a design perspective once content is curated. It's interface and features are best suited to a heavy blend of interactives, text, and simple assessments.

Modern & Innovative	Rise provides a clean, simple, and intuitive experience that incorporates a variety of media types and interactives giving it a modern look and feel while also providing basic modern benefits from a design and evaluation perspective.
Centralized	Rise content is published via SCORM packages to be hosted in Sumtotal, making it easy to provide centralized access on the Elevate site via a link.
Scalable	Rise allows designers to create templated courses and blocks, making it easy to create many cohesive and consistent experiences in a short amount of time. Once created it requires little upkeep and does not require facilitation.
Personalized	Rise itself lacks personalization features, however intentional design elements such as providing choices and varied examples can support personalization of the experience.
Modularized	Due to published outputs being SCORM files ni SumTotal it is easy to reuse and share Rise courses and microlearnings to incorporate into other learning experiences or provide a mix-and-match "playlist" of modules.
Immersive	Rise provides interactive blocks such as scenarios that provide simple ways to simulate a conversation. The level of personalization and adaptation is very limited, but it is far superior to a simple quiz and humanizes the experience.
Collaborative	As with all L5 content, collaboration would be essential to create valid learning experiences.
Easy UX – Intuitive/engaging	Rise is highly intuitive making navigation very simple. Learners can move through in a linear fashion, but also have the option to jump around the course using a sidebar menu. There are also opportunities to "lock" lessons until a specific action or lesson is marked complete by the learner to directly support scaffolding.
"Coach-Friendly"	Reminders, links, and embedded forms can be incorporated into Rise to make it coach friendly and reflective of the larger leader-learning ecosystem.
Learners know where they are on their journey and what to do next- (Learning Journey Awareness)	Learners can see their own progress within Rise, however coaches and others can not see progress outside of course completion if incorporated into the My Development Planner.
Data rich with measurable success metrics	Rise provides some data, primarily centered around formal quiz scores and completion data. Qualtrics surveys can be incorporated to collect stronger assessment data. If PI Learning incorporates xAPI data collection platforms there are a few additional data-collection opportunities.
Incorporates Helios Design Standards	Rise aligns well to Helios Principles, however like any tool intentionality around design, accessibility, plain language, and branding is key.

B: Storyline Requirement Alignments

Modern & Innovative	With skillful visual and experience design Storyline can provide a very modern look and feel while also providing a highly engaging learner experience. It is innovative in it's use of interactive components and data-collection opportunities when paired with xAPI.
Centralized	Storyline assets can be embedded into other tools (such as Rise and SharePoint) or published into SumTotal to be easily linked in various places while still having one centralized location.
Scalable	Storyline templates can be created to more easily scale a portfolio of cohesive learning assets, however creating Storyline assets are more technical and time consuming than Rise.
Personalized	Storyline's interactive capabilities allow for more personalization by providing branching experiences and more customizable scenarios.

Modularized	Storyline assets lend themselves to being easily "chunked" by topic and skill, making it simple to incorporate them into multiple places.
Immersive	Storyline provides more immersive opportunities for learners from customized scenarios, the ability to add sound and audio walkthroughs, and interactive tutorials that can help learners get as close to hands-on practice with tools as possible.
Collaborative	As with all L5 content, collaboration would be essential to create valid learning experiences.
Easy UX – Intuitive/engaging	Storyline is generally easy to use and intuitive as it tends to be a more linear progression of content and more engaging due to the breadth of media types, interactive components, and need for brevity and conciseness.
"Coach-Friendly"	Reminders, links, and embedded forms can be incorporated into Storyline to make it coach friendly and reflective of the larger leader-learning ecosystem.
Learners know where they are on their journey and what to do next- (Learning Journey Awareness)	Learners can see their own progress within a single Storyline asset, however coaches and others cannot see progress outside of course completion if incorporated into the My Development Planner.
Data rich with measurable success metrics	Storyline provides some data, primarily centered around formal quiz scores and completion data. Qualtrics surveys can be incorporated to collect stronger assessment data. If PI Learning incorporates xAPI data collection platforms there are a multitude of additional data-collection opportunities that are considered the gold-standard for eLearning data.
Incorporates Helios Design Standards	Storyline's ability to be more customizable than other learning tools make it both easier to align to Helios principles and more difficult. Unlike Rise which has limited interface options and limited learning block types, Storyline has fewer guardrails. With skilled visual, learning, and experience design it can be highly effective, but without specific requirements, templates, branding, and guidelines it is easy to create a less effective experience.

C: Additional Notes

It is important to note that based on the outcomes and requirements some approaches are not suited for the refreshed L5 experience.

Degreed	Degreed provides curated collections of content that is appropriate for optional knowledge development. It lacks valid, reliable, and integrated learning data as well as skill-building development opportunities, making it inappropriate for the L5 refresh requirements and outcomes.
FidVid	FidVid is a video hosting platform, not a learning tool. FidVid content can be incorporated into other learning tools such as Rise, Storyline, Degreed, and NovoEd, however it should not be used as a standalone for learning.
NovoEd	NovoEd is a powerful learning tool, however it is designed for cohort-based experiences and is often reliant on aligned facilitators to manage. It is not well-aligned to the L5 experience based on the sheer number of leaders, limited number of coaches/facilitators, self-paced approach, and independent nature of L5 development.
DomiKnow	DomiKnow has been used for interactive activities in the past but is no longer a supported tool for PI learning.
SharePoint	SharePoint is a communication tool and information hub, not a learning experience tool. While L5 content will be available on SharePoint, the experiences themselves can not be created purely in SharePoint.