



About the Emergent Series

This episode is part of the Learning Uncut Emergent series where we talk about rapidly changing business models, and how Learning and Development can support organisations to adapt. Exploring how learning professionals can emerge from disruption as relevant and effective. The series is co-hosted by Michelle Ockers, Laura Overton and Shannon Tipton.

Michelle Ockers:

Today, we are talking data, and my guests are Trish Uhl from Owl's Ledge, who is a senior consultant who works with clients on leveraging technology and data analytics to help get their people flourish and organizations thrive. Hello, Trish.

Trish Uhl:

Hey, Michelle. Thanks for having me.

Michelle Ockers:

It's nice to have you back. Of course, you were a guest with Rachel Horowitz talking about learning engineering. Is that right? Have I got it right? At Mars, earlier this year.

Trish Uhl:

Absolutely, yes. And data was a component of that, or is a component of that.

Michelle Ockers:

It was. So I'm looking forward to exploring more examples with you. And we're joined also by Kevin M. Yates, who, interestingly, calls himself a learning and development detective, who works in a global organization in impact analytics. Welcome, Kevin.

Kevin M. Yates:

Hello, hello. Thank you for inviting me to talk to you today. I am super excited, by the way.

Michelle Ockers:

Me too. It's a great topic, an awesome topic. So let's, before we get into the topic, have a quick chat about what the last six months have been like for each of you, and what the change and disruption has meant for your work. Maybe if we start with you, Kevin.

Kevin M. Yates:

Yeah, that's a great question, and so the past six months have been very interesting for me, both personally and professionally. I'm a very transparent kind of guy, so just so that people get a feel who I am, I'd like to start with that first. When the pandemic first happened, it was very difficult for me. I live alone. I am single. And so having to be in my home on lockdown was very lonely. I experienced loneliness in a way that I've not experienced before, so the whole experience was just very different. It was very odd, and it was very strange. I am fortunate to have been able to continue working during pandemic. So many people have lost jobs, and so many people's personal lives have been disrupted, and so my life was not disrupted in that kind of way. But just on a very personal level, it was a quite a difficult

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adjustment. So that's a little bit of the personal, but then just in terms of the work and the impact, and what it's been like for me for the past six months, the good news is that I have been able to continue to do the work that I love.

Michelle Ockers:

Right.

Kevin M. Yates:

And so that kind of makes up for all of the difficulty, right? So I consider myself very fortunate to have been able to do that. I am super engaged, super passionate, with the idea, or about the idea that we can actually measure the impact of training and learning on people's behaviour, performance, actions, and ultimately business goals. So the past six months have really just been a continuation of the work that I've been doing for the past, gosh, three or four years. So it's a good balance, right? So there was that little bit of hiccup, when pandemic first started, and the way that it impacted me personally, but then the good news is that I was just able to continue doing the work that I love, even while I was at home. So that's what the past six months have been like for me.

Michelle Ockers:

So a mixed bag, but that blessing, as you say, there have been a lot of people that have lost their jobs, or been furloughed for long periods, so it's a joy for those of us who've been able to continue working.

Kevin M. Yates:

Absolutely.

Michelle Ockers:

Yeah. And Trish, how have the last six months been for you? What's the change and disruption meant for you, a little bit personally and professionally?

Trish Uhl:

Wow. Well, so Kevin and I are both in Chicago, and have actually been in touch at different points of various crises that have of course been happening in the United States. And I think one of the commonalities, and Michelle, of course, you and I have had some conversations here between North America and Australia, and I think that the first thing is the commonality, and that part of it for everybody has been, and at least amongst the three of us, has been how do we take care of loved ones? How do we not only take care of ourselves, but how do we support people that we care about that are either other members of the household, or as Kevin was talking about, I also live alone. I'm here with Ozzie cat, but I have family in other parts of the United States, and as has been the case in certainly other countries, we were just having a bit of a chat about different parts of Australia, but same here in the United States is that the impact of various crises has been different. It's not been evenly distributed.

Trish Uhl:

And so I'm really excited, because one of the things that's happening for me is I'll actually, I have a relative who's celebrating a milestone anniversary, who's turning 80 years old next week, and I've made the decision to actually, for the first time in months, to venture longer than, farther than five miles from my home in order to be able to go and visit, and have a little bit of a celebration even though things here are, continue to evolve as far as the public health crisis is concerned.

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Trish Uhl:

That being said, I think, of course, to both of your points, much gratitude for having the luxury of being able to work from home and being able to continue in not only making a living, but also being able to do and focus on things that I love to do. And what's been fascinating to me, having a background in technology and data analytics, has been how much the world has changed, because we're now, all around the world, looking at data analytics and dashboards on a regular basis in order to figure out how to manage the things and the people and the relationship and the processes and the activities that we have in daily life because of the public health crisis, and because of some of the other things that are going on. So at the end of the day, I'm doing very, very well, thank you, and it's awesome to see you both.

Michelle Ockers:

And it's always awesome to see you too, Trish. So let's do a little bit of scene setting. We know that digital transformation's been underway for a long time. We see it, we feel it, we interact with data and all that we can do with data on a daily basis with our personal lives, and in business, you're talking about all the dashboards and analytics to help us understand what's going on right now. Organizations are using data in all sorts of ways. But sometimes it feels like learning and development is behind the eight ball on this, that we, as a whole, are immature in how we're using data to improve employee experience of learning and the outcomes we get. There's been a big shift to digital this year, but we were coming from a low base. So I know there are exceptions, but what do you think? Am I being too negative with my take on where we're at? Trish, what's your current take, I guess broadly, on the current state of learning and development, and also in regard to the use of data? Just in broad terms, where do you see things at the moment?

Trish Uhl:

I think you're spot on with the macro perspective there. The digital transformation has been happening both inside of and external to L&D for quite some time, and we've now had a series of events that have now accelerated and have collapsed some of those adoption timelines, right? So it's kind of crazy how fast we can move in a 72-hour period when there's a crisis that we're responding to, both in terms of L&D as a function and organizations and populations of people specifically. So as far as L&D is concerned, I think that there's a lot that goes into this, and part of it is what certainly we'll discuss over the course of this podcast, but I think L&D, part of what we're missing is that macro perspective that this isn't just about measurement and evaluation of the L&D function anymore, and improving learning or improving training materials, although we definitely have aspects of that.

Trish Uhl:

But it's more about organizations moving towards being informed by data overall and informed by data that being processed by artificial intelligence and machine learning, so that we're moving towards these systems of insight. So this isn't something that's just happening to us, L&D as a function. This is something that's happening all around us, and this is as big of a change in culture, much less the underlying technologies, as I would say moving from the agricultural age into the industrial age. I mean, this is much bigger than what we did with computerization in the 1990s. This is an entirely new, global economy that's being created that was already started that's based on digital rather than the physical world.

Trish Uhl:

And we can talk certainly more about that, so we need to expand our understanding of what do we even mean by data, what do we mean by analytics, what is the broader perspective,

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what are ways that we can use it, not just in order to manage our own internal L&D processes and assets, but then also to be able to contribute to these intelligent and insights-informed organizations, and actually become part of that larger conversation and that larger enterprise, and organizational meeting.

Michelle Ockers:

I like the way you frame that around it's about helping us to connect with what's already going on elsewhere and being part, not just we use it for our own purposes but we're part of that bigger shift in how organizations are using data. Kevin, where do you think L&D sits in this macro picture, this broad picture, that Trish has outlined for us? Are we there? Are we playing? Are we rolling our sleeves up and being part of the movement forward, or are we lagging?

Kevin M. Yates:

I think we're different places. It depends on where you are in the world. And it also depends on the organization within which you work, so I'll just do a plus 1000 to everything that Trish said, as I usually do, but here's the idea, and Trish was spot on with this. Where I see our profession going, not only a little bit now but even in the future, is that we are not looking at data in the isolation of L&D data by itself, or learning analytics by itself, right? So where I see us headed and where I see some organizations already being is thinking about the entire landscape of the organization. So it's not just what training did someone take? It's what other types of resources are they accessing, either through the intranet, the knowledge management system, what types of videos are they looking at, what types of white papers are they downloading, and then that goes into even what types of performance ratings are people getting who download certain types of white papers and watch certain types of videos?

Kevin M. Yates:

Oh, and by the way, what types of courses are those people taking as well? So that's where we get the context of a larger learning ecosystem, as I like to call it, but also thinking about the business as an ecosystem at large. So, again to Trish's point, it's just not thinking about L&D in isolation of itself, but it's looking across the business, across the organization, taking a look at how people are engaging and finding the data that tells that story. Take a look at how people are performing and finding the data that tells that story, and taking a look at how the business is performing, and finding the data to tell that story, and then connecting the dots, and then taking a look at what it means for people who are learning a certain kind of way, who are accessing certain types of assets, who are getting certain types of performance ratings, who are getting certain types of business outcomes and business results.

Kevin M. Yates:

And what sits behind all of that is data that tells those stories, so where I am excited is where I see organizations, L&D and at large begin to think very differently about the role that data plays in HR analytics and L&D analytics and business performance. So, again, it's not just one story. It's just not the L&D story. It is the bigger story. And it just so happens that L&D is part of that bigger story. And we have a data stream, we have data connects, that hook into the larger data that helped us really get at some answers that we've not been able to get it before now.

Michelle Ockers:

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And interesting, you use the term that the business ecosystem. That ecosystem of course these days extends beyond the boundaries of our organizational walls as well, and I'm sure that's the same with data and how we use data. And I'm certainly aware from my work in the aviation industry of some great examples of data sharing right across the industry for the betterment of the whole industry, particularly in regards to safety management.

Michelle Ockers:

So on that note, let's talk about what we can learn from outside of learning and development and some examples of areas that use data really well and what they use it for. Trish, do you have an example potentially to kick us off on that stream of conversation?

Trish Uhl:

Well I think you just came up with a great one, and that is in thinking about flight, right, and thinking about how airplanes move through physical space. So no airplane, well, very few airplanes, move through physical space without being kept track of and having sensors that are actually on the vehicle itself, in order to be able to have an orientation of where that particular aircraft is in the space-time continuum, right? So where is it located, what altitude is it flying at, what are the weather conditions that are around it, all of that is streaming data that's actually being collected from the ambient or surrounding environment as the plane navigates whatever journey it's on.

Trish Uhl:

But that sense making, that data collection for the aircraft and the people in the aircraft, is helping them actually make sure, for safety reasons, for schedule reasons, for service reasons, to be able to get from whatever the departure point was to the arrival point safely. Well, it's the same thing if we look at take that, which is a concrete example from the physical world, and take that same idea. We often like to talk about learning as a process rather than as an event. Well, if learning is something that also unfolds over time, it also has an orientation within the time-space continuum.

Trish Uhl:

It's also on some kind of a journey it's trying to navigate, or we're trying to guide it from a starting place to an ending point. What's the current state of where are people were at, and then now through training and other learning-related interventions, we've got a future state, a behaviour change, a new way of working that we want people to adopt, then how might we also use sensors? And some of those sensors may be algorithms and software versus physical sensors like the ones on an aircraft, but in some environments, we might also have physical sensors, right? We might have, but what are ways in that environment, and as people move through space and time in the same way that an aircraft does, how might we use that steady stream of data from the ambient environment to help facilitate that safe navigation that happens over some period of time, that actually hits whatever the success criteria is, in the arrival of helping people develop themselves in whatever capacity and be able to move things forward.

Trish Uhl:

So, and I think that that's really huge. It's just that idea of how do we look towards the physical world and tangible things, and how data surrounds what's happening in our physical world, and how that's changing how we interact with the physical world, and then apply it to these more abstract concepts, like did people learn something? Did learning transfer? Are people applying back on the job? Is there a likelihood of behaviour change? Are we having positive impact on people? Is it meeting the mark for delivering value back to the business?

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We can start with the physical world, and then do that translation into the abstract, and I think sometimes that can help at least start to get a mental model knowing.

Michelle Ockers:

I think that flight analogy is great. I think it works really well around the real-time sensing, but if we can extend that analogy just a little bit, what I think is interesting here is not only are you using the data real-time, but you have the data then that's been captured available to gather further insight to inform your next steps. So for instance, just briefly, let's stick with the aviation example, when did some work with Qantas, the pilots, of course, are constantly going back on the simulator, retraining, re accrediting on the simulator. They're practicing emergency procedures in particular, but what they were doing there, and I'm sure this is common practice in aviation, is some of those simulator rides were highly personalized to that pilot, and they designed those simulator rides based on data they had downloaded from the all the flight recording equipment of all the flights that that pilot have done since the last simulator ride.

Michelle Ockers:

So they were able to take that performance data, and extending the analogy, you were asking you know did people learn something, are they applying it? It's also about capturing the performance data, and what does that performance data, tell us about either what strengths to build on or what areas we might need to practice and improve upon for this person. So I think it's an awesome analogy, Trish. It works really well. And then there's the other dimension of the global industry, sharing a huge databases around safety incidents and being very open with sharing that for the betterment of the industry as a whole. So Kevin, do you have an example from another domain that perhaps we can throw into the mix as well and explore to deepen our insight?

Kevin M. Yates:

I do. There is an industry that I believe is, I'm going to go so far as to say may be doing the best job at leveraging data, particularly in a learning capacity, but also in a business performance capacity, and that is calling centres. So I've worked in two calling centres, both of which as a training supervisor. So the first calling centre I worked in was Kemper, which I don't believe is in business any longer. I don't think they are, Trish. They were up north somewhere, what, Kemper Lakes or something like that. Long Grove. Long Grove, Illinois.

Trish Uhl:

Oh, wow.

Kevin M. Yates:

Yeah, yeah, yeah. And so that was a little early in my career. And then the other call centre where I worked was for the Chicago Tribune. And so again, both of those in a capacity of training supervisor, training manager. And even then, and this was a few years ago, we were using real-time data to drive the decisions that need to be made about where we could support people with training, learning and development. So think about a call centre, right? What I remember the most about the call centres is like these big mission boards, like Mission Central, right? So there was a big board in the room, and it would show how many calls were coming in, how many calls were on hold, how many agents were available. But then even as the agents were taking calls, what was logged, because this is how they had to do it, they would have to log, the type of call that came in.

Kevin M. Yates:



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So the data that then exists on the other end was, how long did it take for an agent to solve a particular type of call? So because, again, the calls were categorized, we had all that data. So we could go back and take a look and say, "Agents are really struggling with handling or solving these types of calls, because that's what the data says." And so then we were then able to link training and learning back to what the data said about where people needed the most support.

Kevin M. Yates:

And similarly, we were able to take a look at data that showed where people were really excelling in terms of being able to answer a call in a minimum amount of time, so that then meant that we didn't have to necessarily focus so much on those areas but focus in other areas. So as I think about it, and I'm glad you asked that question, because I just thought about it now, that really cost centres were at the forefront of this whole data thing now that I'm thinking about it.

Kevin M. Yates:

And I'm thinking about and I'm talking like 10 years ago, or maybe even more. And so I'm thinking about how we used real-time data to inform, again, decisions about where we needed to be supporting people more, where we needed to provide more training, where we needed to provide less training. And that, I think is, as I think about it, that was an amazing experience even then, and I hadn't even thought about it before now. Just in terms of how those calling centres, 10, 12, years ago, we're using data to drive decisions about training and learning, and also that data served a dual purpose, because it gave insight into performance of the call centre as a function in the business. So it was really the convergence of data for insight on business performance, but also data to support where we needed to provide more learning and less learning.

Michelle Ockers:

So the call centre example raises some little triggers for me that I'd like to explore, right? Because here I am a call centre operator, working away at my job. I've got KPIs to meet. I'm under a bit of pressure. I know calls are being recorded. Data is being tracked. What are the issues around how the data is used? What are the issues around privacy, ethics, trust associated with gathering all this data on people, particularly as they work, also potentially as they learn? Is there anything there we need to be really alert to?

Kevin M. Yates:

Well, it's interesting because, again, I'm talking about 10 or 12 years ago, and so the laws and guidance that we have around data privacy didn't exist back then at all, like in no shape, form or fashion. So I kind of fast forward to today and thinking about the work that I do relative to data, so there are times where I want to draw a connection between performance and learning, right? So trying to connect the dots between learning experiences that people are having and their real-time performance on the job.

Kevin M. Yates:

So, because of my role, where I sit in the business, I really shouldn't be looking at individual performance data, right, because that's ... I just shouldn't be doing that. So the essence of what I'm able to do is work with our workforce analytics team, who can mask that data, so that I can't see any one individual record, but I can aggregate records, and then that way there's no infringement on data or privacy. So I think that's an awesome question, because there are ways around that, right?

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Kevin M. Yates:

And I don't mean ways around it in terms of being tricky, or sly, or under the cover. What I've just shared is an example of how we do it. So with there being data privacy laws that are in place that are necessary and that are very tight, and I mean tight in a good way, even with that, there are still ways in which we in L&D can partner with data engineers, data scientists, workforce analytics teams to get insight into the data that we need, but do it in a way that doesn't infringe upon any of the guidance, the rules and regulations, around data privacy. Does that make sense?

Michelle Ockers:

It does. And Trish, maybe you can elaborate a little bit from the perspective of trust is a huge issue for organizations culturally, with employee engagement. It's employee trust and customer trust. I guess we're talking mostly about employees, and during the pandemic we've seen how critical that's been, particularly as people are not physically together as much. We need this trust, environment of trust. What part does data play into that? What are the pros and cons of data? How can it help you to build trust or diminish trust?

Trish Uhl:

Yeah, and these are great insights. Just even thinking about both of the examples, right, flight and thinking about the call centre. In both cases, it's not enough just to have the technology and the data. You need people taking action on the insights that are generated from using the tools. And if people don't trust the source of data, if they don't trust the intention or the intent of the organization that's generating the data or collecting the data, if we don't have that trust and no action is taken, and then it's just, those are just sunk costs, right? Then collecting the data, processing those data, analysing the data, and then trying to distribute insights from that data just is wasteful if people aren't actually feeling like that information equips them in some way that helps them advance, right? And helps them advance, advance in a positive and meaningful way. And advance could even be just to do their job better.

Trish Uhl:

So in the call centre, like with Kevin's example, if you're somebody in a call centre and you've got KPIs, like you were saying Michelle, if we think about what it's like to be in a call centre, some people listening to this podcast probably have the experience or know somebody, and certainly have probably interacted with somebody in a call centre. But if I'm in a call centre, I probably have some incentives, right? There's probably some bonuses that I can make. There's promotions to be had, there's a career progression potential. But another good thing about call centres is oftentimes those performance metrics are very clear, like what do you need to do in order to earn something, achieve something, move forward, get promoted?

Trish Uhl:

And so if you're using my data, right, even in the aggregate, to help me improve, so that I can actually better pursue one of those goals and achieve more and do it faster, that is something that we, as humans, will almost always exchange all kinds of data and information, regardless of compliance and laws, and regardless in some cases of ethics, if it's going to help us make something easier and more convenient, or make something faster.

Trish Uhl:

So we have to do the basics, right? The basic hygiene around data. We have to make sure it's compliant, we have to look at the legalities, we certainly have to honour the ethics, and I

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would hope that anybody who's listening to this podcast, that's just fundamental in anything that it is that we do. But when it comes to helping develop a culture that is informed by data, that takes action on data, this transparency, again, what are you collecting What are you doing with it, how does it help or hurt me? That transparency and that trust has to be in place in order to be able to have a culture that is driven by data informed, that makes data-informed decisions and leverages insights.

Michelle Ockers:

Thanks, Trish. That's good guidance for people there, nicely balanced answer. And it's around being clear and selling the benefits, showing people what the value is for them to be able to gain insights using data that's gathered around their performance. The examples that we both touched on, really interesting, fitted nicely with that that macro view you started us off on, Trish, which is it's not just about data, about learning, and L&D using data, but it's about the bigger business data and how we're part of that bigger ecosystem in which data is used. And we touched on how L&D could be using the data in the call centre example and the flight example.

Michelle Ockers:

Do you have any specific examples of where you've seen data used really well by learning and development? Obviously we've got the Mars story, which we'll link to in the show notes, as one example. What other stories have you got that maybe one or two stories you could share around were L&D using data well on what they've done with it?

Trish Uhl:

Yeah. So, a couple of things just to again put things in a little bit of context and then bring in a quick story. So if we go back and think about both examples, both the call centre and flight, it's way finding, right? And you just used a great word, Michelle, it's guidance. So what we're doing in organizations in the larger ecosystem, and Kevin saying before, ecosystem and the organizational ecosystem, this is critical, because that's ... we're transforming our organizations overall into these dynamic, living, breathing, volatile, changing ecosystems that respond to what's happening in the larger world. And so then we have to, as L&D, be a part of that with it. And then we're helping our organization and the business help the people to keep pace with what's happening in the larger organization, which of course is happening in a larger market and the competitive landscape in the world.

Trish Uhl:

So in thinking about that, it's almost like concentric circles, right? It's this ripple effect. And if we put L&D at the centre of it, we are then helping people way find through these different types of challenges. And traditionally, we're used to indicators that are lagging. We're used to getting to the end of something and then measuring backwards, and there's still validity and that, but we now have, as we've been talking about, methods of being able to. We have two other indicators that are available to us, formative, right? Leading indicators. What is the likelihood of something happening? We can get into predictive. And then the other one is current indicators, again, orientation, way finding, where are we at today? What's the pulse check? What's happening in the organization right now? And there's a ton of examples of being able to use data to guide people through a particular process or business transaction or relationship or type of activity.

Trish Uhl:

One of the ones that I think about that I've worked on recently for an organization is they were having a problem with profitability. So wholesaler. They had, sales were increasing, but

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the profitability wasn't there. And even though on their reports on paper, it looked like the profit margins were correct, what was actually left over in the bank account at the end of the day wasn't truing up, right? It wasn't connecting. And things were tighter than it really felt like it needed to be. And so, you start with this business problem, like how do you solve that problem? It's not just the profitability. It's cash flow. So what's contributing to that? What are the contributing factors? Is it something with the customer? Something with the products? Is it something with the staff? Like where do you begin to look? And what we started to do is we started to analyse the data We started looking at operational data and how this connects back to L&D is, again, as Kevin was saying, is that we have to have this broader context, right?

Trish Uhl:

It's not just about training data and learning data. It was ultimately, at that point, it was working with operations and saying, okay, there is a human behaviour element that is contributing to this business outcome, and we're going to need to address the people element in a way that's going to help move the people and the organization forward. And the thing that we found out was it wasn't that anybody was doing anything wrong. It was just that when you looked below the top line sales and got into what was driving sales, it was actually a new class of products. It wasn't the same old stuff.

Trish Uhl:

And it turned out that the discounting strategy that had been applied to old product that customers used to order now actually was hurting the business if you used the same discount strategy. So we had to retrain. So once we identified, well that's what the problem is. Well, where is the problem coming from? Root cause is this classic performance consulting. Well, nobody's doing anything wrong. They're following the right process It's just that the customer demands have changed, the conditions have changed, our business practice now needs to change. And in order to change the business practice and the process, we have to retrain and re inform the people. Data.

Michelle Ockers:

So in that example, Trish, at what point do L&D get involved? Because all of that data analysis could well be done by another group in the business, so where's the involvement of L&D in that one?

Trish Uhl:

Well, then that goes into, we have to find ... one of the biggest things about data is it's not enough just to have the data. It's not enough just to have the technology. It has to be using those things in service to solving problems that matter. So we need to come out from our L&D desk, right, our L&D world, and we have to say, "Okay what are the things, what matters in the organization, and what matters with people today?" And we don't have to boil the ocean as they say, right? It doesn't have to be overwhelming. We can focus on a particular area, because here's the exciting part. The value that L&D brings to this is domain knowledge and expertise.

Trish Uhl:

So Kevin was talking about being a learning professional with a background in call centres. No matter where Kevin goes in his career moving forward, he can use that domain knowledge, and his organizational knowledge, and his knowledge of all cool things, like learning sciences and instructional design and training delivery and media creation, and all of these different disciplines that really resonate with us and now, augment that. I'm using

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you Kevin just as an example, but augment that to be able to find problems within segments of the population that we feel comfortable, or at least some familiarity, to get started with. It doesn't have to be everything. It doesn't have to be grandiose, but sometimes it's even small, small changes that we can help orchestrate with people in the business that can have larger downstream impacts. And we need to start developing the curiosity and the willingness to experiment, and to be okay with learning or failing and learning from those failures as we go, to start moving in those directions and getting that kind of practice.

Michelle Ockers:

Yeah.

Kevin M. Yates:

I want to bold, underscore and highlight, italicize, big spot, everything Trish just said, right? I was just sitting here getting excited, because the essence, and I don't even know if she knows that she was doing this, Trish was connecting the dots, right? Trish was describing how L&D, because we talked a lot about L&D having a seat at the table, and I'm using air quotes when I say that. Well, Trish just describe what that looks like. Right? It's us being partners to the business. It's us being part of the business. And it's also even changing maybe even some of our language, because quite often in L&D we talk about the business. Well, we're part of that. We're part of the organization, so it's not supporting the business, it's supporting the organization.

Kevin M. Yates:

I don't know what the semantics is here, but the essence of what I'm saying is that why I'm so excited about what Trish just described is that she described it in a way that shows how we are part of the business ecosystem. We don't sit outside of it. We're not separate and apart from it. We are part of it. And what we're talking about today, when we're talking about digitization and data and analytics, well, we have a piece of that. We have a contribution to that, but it isn't just something that we want to use in isolation in and of itself. We have to stitch it together with the rest of the data that's in a part of the business, a part of the organization.

Kevin M. Yates:

So Trish just really got me excited because I love how she connected the dots and really did a great job of describing how we are not, L&D, how we are not separate from, removed from, away from what's happening within the business ecosystem. We are a part of it. And I would just encourage everyone who's listening to run into it. Don't be afraid to engage in that ecosystem. Don't think that just because you were a quote-unquote L&D hat that you don't have a contribution, that you don't have data that's going to inform some decisions and help drive action and help drive business growth. We are a part of that ecosystem, and I want us to actively engage in it that way.

Michelle Ockers:

You just reminded me of a really good example from Cotton On Group here in, based in Australia but operate globally, clothing retailer, manufacturer and retailer, and Beth Hall came on the podcast, on Learning Uncut, last year. I'll put a link to her episode, but one of the things she talked about was they start with performance. They always start with performance. So they don't run leadership programs where facilitators facilitate content, they start with a performance need, and they facilitate using the learning content to draw upon, but they facilitate a group solving a business problem, and their learning and development team looks at the business data on an ongoing basis. I'm talking daily, they're looking at the

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retail data to say, "What's this telling us about where there are performance needs that we could be helping the business with?" I think that's a really nice example. Have you got any other specific examples, maybe one more specific example, Kevin, to throw into the mix here for our listeners?

Kevin M. Yates:

Yeah, and along the lines of performance, I'm going to give an example, but I'm also going to do a shameless plug, because it connects with what you just talked about. So, I have an eBook coming out in September. It's called The L&D Detective Kit for Solving Impact Mysteries. And in that, I have five guiding principles. So the first guiding principle for L&D detective work is that performance is the North star for investigating impact. And by investigating impact, I mean looking for facts, evidence, and data to answer the question What is the impact of learning, but it starts with performance. It's focused on performance. It's always about performance. And so one of the things that I think about in terms of using data and analytics to answer that question about the impact of learning on performance is an organization where I worked once that had a learning program in place to support new hires who were coming into the business, who needed to be ready to go out to client sites and add value very quickly.

Kevin M. Yates:

And one of the ways in which we were able to use performance as the North star is to work with the client to say, "What are your expectations for how people will behave, or perform and act when they are on site working with you?" And that drove everything that we did. So we were able to collect real-time data in terms of some of the methodologies that they were using while they were on set at the client that gave us insight into their performance. But then we were also able to hook into a little bit of client data that showed how the work they were doing was impacting the business performance of the client on site.

Kevin M. Yates:

So, the essence of what we were able to do is start the conversation with performance. Performance is the North star. And we were able to identify specific skills, specific behaviours, that were measurable, that were measurable based on observation, but that were also measurable based on what we identified as how those behaviours impacted business results. So again, it wasn't what we thought, what we hoped, what we felt, what we believed, or wishing on a star, crossing our fingers. We were able to use this connecting of the dots between people's performance and business performance metrics that showed the linkage for how people were learning, what they were learning, and then how they were acting and behaving on a client site as it relates to their performance.

Kevin M. Yates:

But we were also able to collect qualitative data, and I don't want to discount qualitative data, because that's important as well. The quantitative data, data that's digitized that's all that's fun, I like that too. But we don't want to discount qualitative data, and so we were able to conduct interviews and focus groups, focus group studies with the clients to say, "To what extent are our people in teams meeting expectations? To what extent are they not? Are they mapping back to the expectations that you identified as performance requirements to be successful on your business?" So again, that was all very data informed and be it qualitative or quantitative, we weren't going on our gut. We weren't going on our feelings or our hopes or dreams or wishing on stars or anything like that, but we did use performance as the North star for what we were measuring. Does that make sense?

Michelle Ockers:



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Yes it does. It does, and we've spoken quite a lot about using data to understand performance and to shape performance. But of course, there's other things with, other ways we're trying to approach learning at the moment as well. And one of the things that's really comes through on the earlier episodes have emerged are around curiosity, experimentation, failure, both for learning and development people, but also for supporting our workforce to learn more through curiosity, through running experiments, through taking risks. How do you think data can be used to support learning in that kind of way, to do the way finding, the sense making the adaptation? Trish, you want to start us off on that one?

Trish Uhl:

Yeah, I mean, again, it goes back to, I really want to underscore what Kevin said about performance. And Michelle, and working on capability maps that we've done for the L&D profession, performance consulting really frames up. Performance consulting as a discipline where people can figure out how to ask good questions, how to discover questions that matter, and then how do you then look at current state, future state, analyse the gap, and then understand the different types of potential root causes? What is contributing to that gap in performance, and then how might we use data to close it? And so when we're experimenting, one of the things that we need to also change our perspective on, and we come by it honestly, is this idea of being right.

Trish Uhl:

And we've been socialized and conditioned to come up with the right solution, and then prove to somebody that our hypothesis was the right thing. So when we construct a learning intervention, when we put a training program together, when we create e-learning, when we implement an LXP, when we do any of those things, that is a hypothesis until it actually goes out into the organization and gets beaten up by people, right? So what's the old adage, that no plan survives first contact?

Michelle Ockers:

With the enemy, yes.

Trish Uhl:

With the enemy, or with the customer, right?

Michelle Ockers:

I think that's McArthur.

Trish Uhl:

Well and so this is, so, and again we come by this honestly. I mean, if we go back and take a look at, if we look at workplace learning as kind of evolving from academia, and if we look at the way that academics go through higher degrees, right? So I mean if you do a master's thesis or a doctoral dissertation, you have to defend the approach that you took. You have to defend your research. You have to prove to these powers that be that you have credibility.

Trish Uhl:

And so we have inherited that, that we feel like our solutions that we're bringing forth into an organization, where none of our solutions are going to exist in a vacuum. To Kevin's point, we're not divorced from the organization around us, like our solutions have to work or not work. So that's where the curiosity, that's really experimentation, that's where the concept of failing forward, failing fast, failing cheaply, learning quickly, being able to iterate, all of that

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comes into play. And I love that piece too, because that also goes back to that whole learning engineering discipline and. And part of that overall learning engineering toolkit.

Trish Uhl:

And so we can use the data, again, not to wait until six months down the line, or even 24 hours down the line. We now have access to cheap data storage, cheap data generation, cheap data analytics and tools to be able to analyse. We also have access to instrumentation that we've had all along that we just didn't know how to use in this particular context. So one of the methodologies that I've been using for quite some time now, because I started out with him, is Ken Phillips has the predictive learning analytics, PLA.

Trish Uhl:

So Ken wrote the algorithm and I wrote the implementation plan and we started that work, well Ken started that work probably about seven years ago. And then I wrote the implementation plan on how do you take that into an organization and actually use Ken's algorithm to solve a problem. But that whole collection of data starts on smile sheets, but it's not the typical questions that we see on a smile sheet or a happy sheet. It's actual items that get to the heart of the factors that are necessary to construct a predictive model, which means, number one, we control the instrument. We can control the level one, the Kirkpatrick level one evaluation forum. We just need to modify the items that we asked accordingly. And then number two, we have to learn how to then analyse those data, what we've collected. And it doesn't take a lot. As a matter of fact Ken's PLA formula starts with 11 factors, 11 questions, but we oftentimes, in bringing it into an organization, find that it takes a lot less.

Trish Uhl:

A last thing on that real quick is Derek Mitchell's work out of the UK. Derek is fantastic. He's another one that actually has, he's triangulating three different data points, and what Kevin said before about qualitative data, qualitative data is actually the path to prediction. Predictive algorithms run off of qualitative data, and we all have access to qualitative data, because we have people's comments that we've collected in probably level one evaluations or happy sheets over some period of time.

Trish Uhl:

We have qualitative data in call centre tickets that people have called into IT. We have all sorts of qualitative data that we have access to in an organization that we might be able to analyse and get easy access to, probably in some cases, easier than some of the other. So instead of walking into somebody's office and asking for sales data or something like that, we might be able to get access to some semblance of qualitative data or collect it ourselves.

Trish Uhl:

So, there are easy ways to get started in really what's a discipline that we've had since the 1980s. The only thing that's changed in analytics, it's not that analytics haven't been possible. We've actually been doing this since the 1980s. It's that the tools have gotten cheaper, the collection of data has become more immense, and our ability to, again, cost effectively store it, access it, prep it, analyse it, and then actually put a data story together and cascade that out, those are the things that have changed. But we've got a long history here that we can tap into.

Michelle Ockers:

I'm going to get your take on something in a minute, Kevin, but I just want to, Trish, something you just said that I thought was so profound, and I've gone, "Yes, I'm going to

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start talking about this because it's so important as a reframe." I don't know, you're nodding. I don't know if you know which bit it was. Everything we do is a hypothesis. Every learning solution we put out is an experiment. Treat it as an experiment. I think that mindset shift alone could take us leaps and bounds further as learning teams, as learning professionals, in how we think about data and the role of data, if everything is an experiment.

Michelle Ockers:

So, thank you so much for that. At a personal level, amazing insight. Kevin I know you particularly wanted to talk about the smaller learning and development team, or the learning professionals in smaller organizations, and that's something occupying your mind lately. So before we go into our kind of final rapid round of advice, what's been coming up for you around that theme, around that topic, around that need, and what are your thoughts on that at the moment?

Kevin M. Yates:

Yeah, I definitely want to answer that question, so I'm not going to lose it, but I want to tie in to that last point as well, because Trish used some words that I believe we may be sometimes afraid of as a profession. And one of the words that she used was experimentation. And Trish also talked about needing to get it right, so here's where I think data is awesome and amazing. Sometimes data will tell you that what you're doing is not working. I want that marinate for a minute. Now is that a bad thing? Absolutely not. Because if the data says what you're doing is not working, guess what you need to do? Stop. Stop what you're doing, right? So in other words, again, kind of connecting to Trish's point, experimentation is a good thing. Trial and error is a good thing. Getting answers that don't always feel good is not a bad thing.

Kevin M. Yates:

And when we have qualitative and quantitative data that supports a decision to do something or not to do something or to stop doing something, I think that that's a good thing. So I just, I wanted to add that in because I think it's important, again, for all of our L&D brothers and sisters that are listening today.

Kevin M. Yates:

And yes, I've been thinking a lot lately about the L&D department have one, or maybe that L&D department have to, because quite often, I do a lot of speaking and a lot of writing, and I've had the benefit of working at some amazing organizations who are at the forefront of data and technology. And so I'm able to do some things that not everyone is able to do. And so I want to inspire that department of one or that department have two to not feel as though just because you don't work at an organization that is huge and large and has access to mountains of data, that you can't come on this journey with us, right? Because you can start exactly where you are with the data that you have, and you can begin to answer questions. You can begin to gain insights. You can even do some of that trial and error that we just talked about, right? You can use data for some of that experimentation. You can use some of that data to figure out if you're getting it right or not getting it right.

Kevin M. Yates:

And so, again, I don't want anyone out there who is listening today who may be saying, "Oh, Kevin and Trish, are, they've had these amazing experiences and they just have access to mounds and mounds of data, so yes, it's easy for them." I don't want anyone to get discouraged, again, because even if you are department of one or department of five, you can start exactly where you are. You can come along on this data journey, and you can use

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data to inform decisions. You can use data to do a little bit of trial and error, you can use data for experimentation, so don't feel as though you have to be left behind. Because you might not be large or have expansive amounts of data or have just incredible technology where you work. I wouldn't let any of that stop you from coming along on this data analytics journey.

Michelle Ockers:

Thank you, Kevin. I think that's a point well made. All of us can be here at the data party, right?

Kevin M. Yates:

Yeah the data party, I like that. As long as there's white wine. As long as there's white wine at the data party.

Michelle Ockers:

We'll make sure there is, Kevin. So time for our action time, our rapid round of advice to learning professionals. We're doing this on all of the emerging episodes and looking for patterns and trends across all of the advice. So we'll go through stop, start, continue. And Kevin, what advice would you give to L&D professionals, either just broadly or in the context of data, what do you think L&D professionals need to stop?

Kevin M. Yates:

I believe L&D professionals should stop believing that data is not what we do, that data is not a part of our work, that data is something that other people use who are in the organization. I believe we should stop that thinking, stop that mindset.

Michelle Ockers:

Okay. Trish, stop?

Trish Uhl:

Can I twist it a little bit? Can I go to to start?

Michelle Ockers:

Yeah, sure.

Trish Uhl:

So, because that was the thing that first came to mind. So, I mean, so we need to we need to start looking at, when we talk about the language of business people often jump to financials, but the language, another language of business is risk. And so we need to think, and especially in current conditions around the world, and multiple crises, we need to think about what's the risk? What's the risk of not getting this right, right? What's the risk of us implementing this hypothetical solution into the organization, and we wait 18 months, and it doesn't hit the mark that it needed to hit? So, if we look at risk, and look at data early and often in that process to get a formative evaluation of what's happening as we go, rather than summative just at the end, it's back to that way finding. It's going to help us navigate and make the changes that we need, and we can talk to our organizations about risk, and we can ask for resources based on avoiding and mitigating risk.

Trish Uhl:

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So then what we need to stop doing is exactly what you and Kevin have both said, and that is seeing ourselves as separate from the rest of the organization and this living, breathing ecosystem and really be part of it. And then strengthen. I think in strengthening, we need to look at what are the technologies now that are helping us to enable the analyses of these types of data? And just a quick mention now would be just going back to Kevin's call centre experience from more than a decade ago.

Trish Uhl:

We can now not only collect data about number of calls and duration, or how long someone was on a call for, but we can now actually use artificial intelligence to be able to process the transcripts of those phone calls as they're happening. And so, AI is tracking data, because data is now your voice. Data is now what's an image, what's in a graphic image. Data is now content in virtual reality, or content in a video. And so our understanding of what data is, right, and what constitutes data, and that's where artificial intelligence really comes in is it gives us the ability of being able to process more types of data, both structured and structured at speed and scale. So just like we could real-time analyse for things like empathy and tone of voice, and people building rapport on a call centre, it's in addition to, it extends other things that we used to measure or have measured for a long period of time.

Michelle Ockers:

Thanks, Trish. So Kevin, we'll come back to you. You still got to start and and accelerate opportunity here.

Kevin M. Yates:

So I'm going to say, as a relates to start, it's indirectly related to data and analytics as we've been talking about, but thinking about what I would encourage the L&D global community to start doing, I would say start thinking about performance as an outcome for learning, not the thing that you deliver or the things that you create as the outcome. And then ultimately, what we'll have access to is data that shows the extent to which what we've created, designed, delivered is impacted performance, but let's start thinking about performance first, performance first, performance first. I believe that performance is an outcome of learning so let's be thinking about that first. And then just in terms of where we might want to accelerate, I believe that that was third thing?

Michelle Ockers:

Absolutely, yes.

Kevin M. Yates:

Yeah. So, when I think about where there's opportunity for us to accelerate, I'm going to sound like a broken record here, and I'm just going to say a lot of what Tricia has already said, what I've already said. Accelerate those relationships in the organizations where we work. So start to establish relationships with the workforce analytics team, establish relationships with production, establish relationships with operations, establish relationships with finance, establish relationships with accounting, establish relationships with leaders. Right? So I want us to begin to think of ourselves as part of the organization, not separate from the organization, and I believe that by creating those relationships that we might not otherwise have, we gain greater insight into the organization, we're better connected to it, and then actually, when it comes to trying to get that data that we're looking for, we already have those relationships built so it's a little easier to get.

Michelle Ockers:



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Absolutely. That was a both fascinating and really practical conversation around data for L&D. Thank you so much, Kevin and Trish, for joining me for this conversation today.

Kevin M. Yates:

Thank you This has been awesome.

Trish Uhl:

Thank you, Michelle. Thanks, Kevin. Good to see you both

Kevin M. Yates:

Thank you, Trish.