

Learning Uncut Episode 106
Digital Adoption Platforms: embedding resources in the workflow – Sebastian Tindall Hosted by Michelle Ockers



Michelle Ockers:

It's been a little while since we have had a returning guest on Learning Uncut to talk about what happened next with a body of work from an original episode. I'm really delighted to have Sebastian Tindall from Vitality returning to talk about how his resource led learning strategy at Vitality has evolved over time.

We do end up talking quite a lot about digital adoption platforms as an evolution of the kind of resources that have been most useful and valuable in the organisation and how to actually work with digital adoption platforms. One of the things that really surprised me in this episode was how active a role Sebastian's team play in evaluating processes that they're being asked to develop training for – to the extent that they have actually created a custom scoring mechanism to look at the complexity of a process and they ask end users to actually rate the complexity of a process to help them estimate the training load involved and then to have a data informed conversation with the business owner of the process about whether they really want to go ahead and implement that process and what that means for the training success metrics. It's just fascinating the way the team is using metrics, the kind of conversations they're having fuelled by data in the organisation.

So anyone who is serious about taking a business first mindset about impacting organisational performance in their role as a learning and development professional, I know you're going to get a lot out of this conversation with Sebastian.

Michelle Ockers:

Sebastian Tindall, welcome back to Learning Uncut.

Sebastian Tindall:

It's a pleasure to be here. Good to speak to you again.

Michelle Ockers:

Yes. This is your third time on Learning Uncut. The first time, which is where we're going to pick up the story, back in November 2020 in episode 66, where we first explored your resource-led learning strategy. And of course you and I were guests. Laura hosted an episode of the Emergent podcast, where we talked about capabilities for learning and development. So welcome back.

Sebastian Tindall:

Wow, I did not realise it was that long ago. And do I get a prize for third time back?

Michelle Ockers:

I'm trying to think. I think you might be even-pegging for the most frequent guest, I think we... Arun...

Sebastian Tindall:

Oh, well, L&D budgets are tight.

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Michelle Ockers:

Arun Pradhan. Yeah. Yeah. The Learning Uncut budget is a little tight when it comes to the podcast, I'm sorry about that. So let's do a quick recap for our guests. The last time we did a regular Learning Uncut case study episode about your work at Vitality.

Sebastian Tindall:

Yeah.

Michelle Ockers:

Almost two years ago, now. We're in August 2022. Back in November 2020 we spoke about your work at Vitality. And just recap for us who are Vitality, what do Vitality do? And then I'll do a quick review of the last episode.

Sebastian Tindall:

Yeah. With pleasure. I think that context helps. So Vitality is an insurance investment organisation. So they've recently broadened their portfolio. So the insurance arm includes health, life, now car insurance. It also looks after investments for its members. And it's... Like a typical insurer, it has a better health element. So making sure you get access to good quality care at your time of need and making sure you can see a brilliant specialist. And obviously that's the element which is making you get back to health when you need it.

And there's also a kind of well-being strand. We've partnered with a specific suite of organisations to promote positive health changes in our members. You know, for example, we offer discounted Apple watches for those people who take part in activity on a weekly and monthly basis, to incentivise, almost, you to make those positive lifestyle changes in order to act in that more preventative space. So yes, we'll be there to promote and help you with your health at your time of need, but also about giving you, and helping you lead a healthier life and a happier life. And that's the element where we constantly engage with our members to make sure that we're promoting those behavioural changes, enhancements for them as well.

Michelle Ockers:

Okay. So at the time we spoke, you had 1000 frontline workers in the organisation. And your team went from having to support 14 projects a year in 2017 to 83 projects a year in 2020. How many are you supporting in a year at the moment?

Sebastian Tindall:

Over 170 now. So it's...

Michelle Ockers:

Wow.

Sebastian Tindall:

Over double, double what it was, which is I suppose an exponential growth element. That's great, but the team hasn't grown exponentially with it. There's about 16 individuals in the team, some of which are apportioned to onboarding, others are apportioned to the change projects. So I guess when you ask what's happened since November 2020, the demands have grown and it's really allowed us to stress test and refine our processes to make sure that we are able to adapt in the best way possible to support the organisation.

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Michelle Ockers:

Yeah. So let's talk about what a project looks like, what a project means. And then one of the reasons I asked this, Sebastian, and I know you are aware of this, but some of our listeners may not be. We've used, when I say we, Laura Overton, Shannon Tipton, and I who run the Emerging Stronger Masterclass together, have used your organisation as a case study for our masterclasses. And I will say, the first time we used your organisation as the case study, we got a lot of pushback from the participants. You may remember you joined us for that and they sort of said, "no organisation would ask you to support that many projects with such a small L&D team. This is not a realistic scenario." We had to say, "Well, it is, actually, it's real." And one of the questions we get is, well, what's a project in this context? What does that look like?

Sebastian Tindall:

Yeah, it's a good question. And don't get me wrong. I don't think there's any judgment per se from me when people say, "That's absolutely ridiculous." My initial response was absolutely the same.

But I thought to myself, you know, there's got to be value in becoming agile enough to keep up with this demand. Even if it's only a portion of it, you know. And I could take that with me for the rest of my career. So rather than looking at that sheer volume and running a mile, I just thought, what if it were possible to try and meet that? And I think that mindset of really leaning into that change was completely transformative for my career. And on the project piece, so it's a good question, 'cause it's not easy to see projects as distinct items, because obviously they they're different sizes. But I think what you find with Vitality and why the number is potentially so high, you have the medical arm, so you have constant medical advancements happening at all times. You know, new treatments for members, new specialists. Absolutely those need to be conveyed as quickly as possible to make sure that we can get people help that they need when they need it. So you've got changes coming from that, and they're obviously complex.

You've got changes with your suite of partners, of which we've got a lot of partners now. Last count about 80-odd partners. And if they want to change something, they're a separate entity, you know, and Apple are not going to call my L&D team and say, "We're going to launch a new Apple watch, are you guys ready?" You know, they are going to do it in Cupertino overnight and the next morning we are going to get calls about it. So I think you've also got that element of change from the partners. And then you've got the internal change from the organisation. The continuous improvement and strategic excellence that they want to deploy. So you've got a bit of a swirling mix of kind of exogenous change from outside the organisation and that from within that comes together to create that kind of bottleneck.

In terms of changes, we would categorise that as anything where people need to do something differently. Again, if they don't need to do something differently, the question is quite easy, well, why bother training them? So again, we will take that and we'll triage it, and we've had to come up with processes by which we can almost estimate the training input and load required for each one, and then prioritise those. And there's quite a simple process that goes on at that point to say, "Hey, look, if this requires a lot of training, the reality is, it's probably not a great process." So it's not necessarily the top ones that we'd end up supporting. There's probably some operational pushback there to say, "If there's that much to know and do differently, we've probably got this a little bit wrong, so let's sit around a table and talk about those." And the ones...

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Michelle Ockers:

Can we just pause on that for a moment?

Sebastian Tindall:

Yeah, yeah, sure.

Michelle Ockers:

So what you're saying is, you actually have an opportunity, if something comes through or process change comes through and it requires a lot of training, to start a conversation with the business to say, "Not convinced that this is the best design process, because of the amount of training it requires." Is that absolutely right.

Michelle Ockers:

Right.

Sebastian Tindall:

Yeah. So this is taking quite a bit of time. And I think one of the things that helped me devise new processes in organisations is thinking about the things that you're trying to avoid. And I think one of the things that I'd experienced in L&D in particular, is when somebody came to us with a process that you could just look at and get a sense that it was too complex, required too much judgment perhaps, or could definitely benefit from some automatisisation, you had to kind of sit there and finger in the air say, "This feels complex. This feels too complicated." And actually that feels like an area that is ripe for interpretation. And there's nothing in the L&D profession that says that you should necessarily be a good judge of that, you just have the experience over time.

So it's about creating some really objective measures to say, it's not about what L&D think, it's not about what you think. 'Cause project managers will always tell you it's easy. It's a simple change. Don't worry about it. It's what the end users think. So the first thing that we will do is we will take your proposed change and we will run the end users through it. And through a custom scoring mechanism, we'll get them to quantify the complexity of the change. And that allows us to go back and say, this is the approximate score, which allows you to compare it to some of the other changes that happened in the organisation. Here were the some of the things that happened with those, so the resultant error rates and issues that resulted when they were that complex, here's the feedback to improve that process.

So we kind of got two options. You can press on as it is, you can accept the risks, and then we will lower our quality measures for the output of that L&D deployment given the fact that this is not a great process, or you can go back and you can start again. Now, one or two things can happen. They can say, "We'll accept the risk." Absolutely fine. But at least you've been that credible business partner and that person that's shaping your organisation, the experience of your people, or they might say, "Yes, we will try again." And that has happened too. And there is a halfway house. Sometimes they'll say, We'll try it. And actually we'll realise that that's part of our debt, our technical debt, and we need to go back and fix it. And that has happened too. So it's been a really interesting process for us to be able to go back, compare and contrast, forecast the training load required. And again, there's an intrinsic cost to that.

It's not just your people wrestling with complexity in the frontline, that will have resulting impacts on the people that contact your contact centre. It will increase your average handling times. It will potentially increase the volume of errors because of the things that people have to get right. But also it will increase the amount of time that we've got to take them away from their roles to be able to deploy this. So there's all these intrinsic costs that can happen as a result of a complex process, some of which land on your doorstep as an

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L&D department, but they are everybody's problem downstream. So let's not just assume that through great training, we can rescue all processes. In fact, a bad process beats a good person every time. So let's be alive to that reality and realise that we've got to equip our people to do this in the best way possible.

Michelle Ockers:

So you're treating that as a value-add, is it... Who's responsible for designing process in your organisation?

Sebastian Tindall:

It's the operational teams. Yeah. Operational teams. And it's an interesting one, because have you ever realized it before or heard this before where sometimes people think L&D are responsible for that?

Michelle Ockers:

Probably not. And that's the reason I ask, because I actually think it's unusual for L&D to be almost like, what's the word, it's not custodians of the process. I had a guest not long ago, Helen Sedcole, who's sort of the Chief People Officer, and it's not her official title, because she has this beautiful title, which has some Māori words in it, which basically mean guardian, guardian of the employee experience. So it's almost like you're being, you are acting in this guardian role not as a gatekeeper, but as someone who's looking after the interests of the end user. And it's a value-add, which I don't often hear learning and development teams talking about.

Certainly, there have been times when my own experience, and in conversation with other L&D people, a process lands on your door and you look at it and you go, well, the process is a bit broken and I don't know that you're going to get the uplift you're looking for or a change in behaviour with a broken process. But to the point where you've actually got a custom scoring mechanism around the complexity of the process. I think there's some unusual things you're doing there as a value-add. So it sounds like you've developed a whole sort of stack of parameters that you use maybe to size the training effort involved with things.

Sebastian Tindall:

Yeah. And that comes over time. And I think that yes, it's atypical, but I guess to a degree, we don't want to be typical, but also it comes down to what you said, that it shouldn't be up to L&D necessarily to look a process and say, that's broken. Give the people a voice, and I think that forum to allow individuals to come back and say, here's what we truly think of a process. And actually, here's the workflow-based resources that we want to be able to support us to do it, is a brilliant, it's almost a cheat code for doing a deployment, because they'll tell you exactly what they think that they want. And obviously, it's not all on that. You're going to introduce your own professional judgment into that, but it's that ability to be able to turn around and say, it's your people that believe that this is not a process that's right or fit for purpose. And I think if you're brokering conversations in an organisation and being a connector, that only adds credibility to your department, and it's just one thing that you add to your process that is specifically designed to actually reduce the volume of training minutes that you're going to produce at the end of your process.

A lot of people will seek to increase. You know, every single part of our process is an exit point and it's specifically designed for efficacy and efficiency. We're trying to reduce what we do down to a point where we're so adept at landing change that we don't need to take you away from your job. One of the things that's going to be absolutely counter to that and pollute the kind of engine is putting poor processes into it. That's going to slow down the speed. So that's not just an L&D problem, that's an organisational problem. If we can play a role in that to really promote organisation effectiveness, I think it does sit within our portfolio.

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But to your point, when I talk to people about it, a lot of people find it strange that it does, but it's been an immensely powerful tool for us.

Michelle Ockers:

I can see the value of it. Absolutely. So when we last spoke, you talked about your four Ps approach, you created a custom learning framework for what you called workflow learning, and I think that was before it was such a buzz word, right, this idea of learning in the flow of work and workflow learning. But your four Ps approach was prepare, practice, perform, and perfect. Is that still a framework that you are using?

Sebastian Tindall:

Yeah, it absolutely is. I think when we spoke to you in sort of 2020, we'd probably been doing that for about 9 to 12 months. And I think that process has many yield outputs that we were going to continually drive down the training minutes, continually increase the ability to support changes. But also the secondary measure that we wanted to really highlight there was, if we want instant organisational change, what are the proportion of changes that we can land instantaneously, and they are resource-only, workflow-only deployments? So we measure our team on that now. And at the point in 2020, we've done very few. They accounted for about 2% of what we'd done.

Let me fast-forward today, about 25% of what we do in terms of projects are purely embedded in the workflow. And I think that's something where the four Ps model is a framework, but the framework is only there to support the metrics that you're going to deliver. And those downstream metrics are starting to bear fruit now, in a sense that we are absolving more and more performance support into people's day-to-day roles, systems in an ergonomic way. And that's how we've chosen to measure that.

Michelle Ockers:

Have the nature of the performance support resources you use changed over the past two years?

Sebastian Tindall:

Yeah. I mean, you look back at what we did two years ago and you just think, what were we doing? And I think that's okay. That is okay. But I think when we first started, to give you an example, we would... You might put a video in there that might pop up and it would kinda go, Hey, looks like you're trying to do this, here's a video, but people don't want that, people don't want to sit there and watch a video that's well produced, it's pointless. It takes you loads of time, videos go out of date really quickly, you can't search for them very well.

And then it was kind of a reversion back to text, and that felt sometimes a little bit counterintuitive, because it's fighting those L&D kind of classic responses of, it's got to look pretty. It really does not. It's got to work. It has to work. If it looks pretty, and that's important to you, fair enough, but it's not important, it's not important to us. It's got to be accurate. It's got to work. So what we've done now is really strip back and create parameters around saying, it's got to be searchable, it's got to be ergonomic, it's got to be... It's got to be two clicks, five seconds. And those body of text, again, body is probably the wrong thing, but those summaries if it's knowledge management, are living, they're organic... Because if someone... People will find new errors and products will change, so you can re-order those things in order to promote those individual items that people miss.

So that you kinda see them rather less as static paragraphs and more just living things that you're trying to move around and place in the right place to actually increase people's awareness of them. And that's moved for us now into less text and slightly more predictive. So we're heavily now into digital adoption platforms, which we are using now as part of our

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evaluation, and instruction, to be fair, to help guide people through the processes as they need to do them.

And I think that has been amazing for us, because if someone comes to you and says, "Look, we've got a new system change, it's happening," well, great, we can change that in a digital adoption software. It pops up Monday morning for you, you follow it through on your first call with a member and hey, presto, there you go. At the back end, we will spit out loads of information from the platforms, which will tell you how long it took people to do it on the Monday morning versus the Friday afternoon. Who's getting quicker, who's not getting quicker, how many steps, how many clicks did it take, at what point do people abandon the digital adoption software?

So all of that stuff in the background is where I see the true future of L&D departments. It's looking in the background at those efficiency stats and saying, "Look, for many, many years, businesses have found digital adoption to be an incredibly hard thing to quantify. Well, we can do that for you now. We know which parts of processes are taking up a lot of time and people are struggling with." So we're suggesting that we will do this. And actually the impact is not satisfaction, happy sheets. And it's not to batter that, I love the profession and I hate people who criticise it, but I think it is very different from the kind of more contemporary classic approaches of saying, we can see in your organisation that there's a problem with this particular process. And that fits and dovetails so nicely into that UX process to say, well, people are taking 10 minutes to do it, we do it 10,000 times a week, there's a lot of efficiency to had here.

Let's take it back to our people, see what would make it easier. Brilliant. Here's a proposed change. Do we want to go for that? If we do, we're then evaluating reporting on minutes and hours saved in a contact centre's department, not, oh, it was 78% of people felt they were ready after a course. And next time, can you please provide more snacks? It's a completely different galaxy from where sometimes we can find ourselves as practitioners.

Michelle Ockers:

Yeah. Different context. Can we go back to basics?

Sebastian Tindall:

Sure.

Michelle Ockers:

Digital adoption platform. Now, we may have people who have not worked with those before and aren't familiar with what... They may have a sense of what that term means, the digital adoption platform or DAP. Can you just take us through what is a digital adoption platform?

Sebastian Tindall:

Yeah, sure. And just for context, so we're probably about a year into our journey on this. And to your point, Michelle, some people don't look at these. Some people are way further on than we are, and I've seen it and I've seen that sort of stuff. So it's probably something digital adoption software that is not ubiquitous in any sense at the moment. So I would advise people, if you do have a lot of technical roles or particularly if there was a singular system in your business, which we don't benefit from but some people do, I would make the argument that a digital adoption platform can be an absolute game-changer for you.

And what it will do is it will act as an overlay, essentially. So we all log on to a system, for example, in the morning, and what you can do is embed pop-ups, click buttons, tips, suggestions, reminders on people's actual systems. Now, just to be really clear, this is not the same as your usual click next simulated PowerPoint. This is actually in your job whilst you're doing it when you're trying to process that things, whether you're just trying to help a

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colleague, whether you're trying to speak to a member on the phone. And I always divert to the phone examples, because they're sometimes the most pressurised for time, and it will instruct you as you're doing it. You can choose the pathways, so you can kinda go, I'm trying to do this, and it might be something that's particularly infrequent and complex.

Well, you've got enough on your plate. You're speaking to somebody, they're at a time of need. You need to make them feel cared for, you need to truly listen to what they need in terms of a specialist. The last thing that you want to be thinking about is system navigation. Well, let's take that away, and for new starters, that can have an incredible impact, because people finish onboarding in many organisations, and they'll sit there and it's hard enough to concentrate in your job in clicking buttons than it is speaking to someone at the end of the phone. And we're trying to completely change that member experience for individuals to say, you might speak to someone new, but they're going to know exactly what they're doing, and that's a lofty ambition. Of course, it's difficult, but the system adoption element of it is something that technology now has started to ease the burden of. And looking at that as a department, I think is an incredible option for L&D practitioners globally.

Michelle Ockers:

Absolutely. And I hadn't thought about the perspective of the metrics that you can get out of that, and the power of being able to look at that and look for improvement opportunities.

Sebastian Tindall:

It's absolutely fascinating, because a lot of contact centres, for example, are efficiency-based, but you don't want to be too reductive, every job is like that. And I think if you can sit there and say, right, you've just started as an accounts administrator, and you can log on in the morning and you know you need to do 10 things. Well, they click on and they select, I'm a new starter, and it says, hey, here's the 10 things that you're going to need to do every day. And it just takes you through it as you need to do it, simple, click next.

And in a hybrid environment, I think it's become increasingly required for departments to do that, because sometimes you can't turn to your left and your right and ask an experienced colleague, and all of them have the connectivism of Microsoft Teams set-ups and etcetera and chat platforms. So if you're thinking about how daunting it could be for an individual to start a new job with some technical processes, not be able to ask somebody, this is make or break for L&D departments and onboarding specialists to make sure that people have intelligent, almost reactive and proactive support embedded in their workflow, because the old methods of tapping someone on the shoulder might not exist for you these days.

Michelle Ockers:

And even if they do exist, they may not be the most efficient because you're having to interrupt someone else, right?

Sebastian Tindall:

Yeah, good point. Yeah, very true, very true. Depends how grumpy the person who's assigned to help you.

Michelle Ockers:

Or busy, right?

Sebastian Tindall:

I equate the two. I'm always grumpy, but yeah, yeah. It's a good point. Yeah, I hadn't thought of that, I hadn't thought of that.

Michelle Ockers:

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So Seb, with the move towards a use of a digital adoption platform, what has that mean for the skill set of your team?

Sebastian Tindall:

The skill set question is one probably I get asked the most speaking at different events, and the answer changes a lot. I know that's not helpful, but that's because I think the skill set changes quite a lot. I think there's an element of balancing plates. When you're trying to push towards performance consulting, performance support, the nuances of the conversation become quite apparent, so I think there's an element of having to reposition your department as someone who is there to solve organisational problems rather than be confronted with training challenges, because as we've alluded to, if you've got a terrible process, for example, no amount of training or no adept design is going to counteract that.

So it's being able to push yourself further up those chains to be able to really talk fluently about organisational challenges, organisational data, truly understanding the workflow of your people, which is a really difficult thing to do. It sounds like a really commonplace buzzword thing to do to understand the workflow of your people. It really doesn't have to be that difficult. Regular sessions, sitting with people who do the job every day, so you can hear their challenges, you can see what they have to deal with, you can hear the member experience, and ultimately, you know how things are measured, and I think those three things have become increasingly prevalent and important for us.

The data piece is a credibility piece. I've seen it on many occasions where people will start with the questions like, why are you analysing data if you're in L&D? It's like, well, nobody owns a monopoly on performance here. Every single department in an organisation uses data, whether it'd be data scientists, and you better believe, they're better than any of us, or there are these support function roles, which are here to support the operation. And if we don't understand how the operation works, how can we support you? So bring us into your data, let us understand the conversations you're having, and let us do that at the point of source, because if you don't do that, you will then be presented with interpretations of the data.

And actually, there's no guarantee that those might be the right interpretations, because we're all subject to making mistakes. And I think at that point, if you can move past being presented with perceived challenges and you can start to work side by side with those individuals that run these departments, you too can start to identify some challenges and start to appreciate challenges in the data. And that's that subtle shift in my mind from you coming to me and farming out problems to my department, to me sitting with you, co-recognising the challenges, talking them over with you, and then we are ensconced in a conversation about organisational performance and not training needs. And that skill set, I've found to be probably more nuanced than we expected.

You know, we all thought that you'd knock on the door and go, hey, we can help you with these three problems, and then the door would be flung open and they would invite you in and there would be fireworks, and everyone will be happy, it just doesn't work like that. Because people...

Michelle Ockers:

That's not uncommon right? So I'm sitting here thinking there are many learning and development professionals who aspire to be able to have the kind of conversations, be involved in the kind of conversations you're involved in, and find it hard to push the door open. So if you can sort of think back to when you first started trying to engage in those business conversations. Where were those conversations happening? Who was having them? Where were they happening? And how did you find out about them and how did you get involved with them? What did that look like?

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Sebastian Tindall:

I think this is where I'm going to tell you that it was already smooth and it went really well. To begin with, it was a nightmare, it was an absolute nightmare. And it's a bit of a minefield, because you're sitting there with the team, and we target our team on finding business improvements on an annual basis, it's a federal model, go out there, find value and add it. You wind them up and you send them off, and then suddenly, they might knock on someone's door and say, there's three things you're not doing very well. Well, that's not the approach.

So then it's the nuances of those conversations. And what we've found is, is that you don't want to be in the forums where the actions are distributed, you want to be in analysis forums. And to begin with, that can be quite difficult. And I'm trying to think of a classy example, but to use an easy one, a complaints forum. Every single organisation will listen to feedback from their customers. And typically, what will happen is that might be aggregated or there will be some verbatim feedback, and then that's then passed onto your team through an intermediary. If you can be really conscious and quite firm about saying, thank you so much for the qualitative data, we want the quantitative as well, we want to go back to the raw data source, 'cause we'll be using that to inform what we do. Take us to that.

And quite quickly, people realise that if you're a custodian of including the data in any of your processes, but in your main analysis piece, people will know that it's more of a pain to go and present it to you and they might as well just go and send you in themselves, because you can be there at that point. And then that's a critical moment, because you're creating some abrasion in a relationship saying, I want to see the data. That can obviously annoy people a little bit, which is really...

Michelle Ockers:

I have heard stories from other L&D professionals who've been asked, why on earth do you want the data?

Sebastian Tindall:

Yeah.

Michelle Ockers:

Like why is it any of your business what our business performance data looks like, or what our complaints data looks like, or any other data? It's our data. Why do you need it?

Sebastian Tindall:

Correct. And what are you looking for? Is the question.

Michelle Ockers:

Yep.

Sebastian Tindall:

So I think if you... You're then in a situation where if you can gain the trust and be able to look at the data, because you're not trying to catch them, you're trying to help, but I can understand, if someone knocked on my door and said, I want to start looking at all your data, you would feel uncomfortable too. But if when you start looking at the data, you're adept enough at analysis that you can start to identify things and you're proving that you're quite savvy as an analysis resource, then that's the point by which the conversation should change. But you have to be good enough with it, and that takes a lot of pre-work...

Michelle Ockers:

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How do you get good enough with it? And we're really talking here about building data analytic skills, right? And we know, and I'll pop a link to the most recent Mind Tools For Business *Learning Performance Benchmark Report*, right? And I think there's a list of 23 skills in that benchmark, and L&D leaders are asked to indicate which of those they have in-house, and data analytics is right at the bottom. That might be 25, whatever it is, data analytics is right at the bottom, I think. And we're struggling with data analytics in the profession, and it is critical to the kind of role we want to play, it's critical to having performance impact, it's a key future skill. So how do you go about building that? How have you done that for yourself and for your team?

Sebastian Tindall:

People assume that L&D professionals are the ones, the only ones that are struggling with data analysis. It's organisation-wide. Now, more than ever, people are presented with data that they're not able to analyse or understand, or they're just overwhelmed by. So I think the first thing that happens in our profession, is people say L&D aren't good enough at it. True of everybody, first thing to realise.

Michelle Ockers:

So don't have a chip on our shoulders about it, right?

Sebastian Tindall:

No.

Michelle Ockers:

It's a whole of organisational challenge, a whole of like many professions, many domains having this challenge.

Sebastian Tindall:

100%. Because you know, you start implementing all these micro-service platforms, they all kick out data, just like digital adoption platform. You're suddenly greeted with data sets that nobody is an expert in. So you have to be in that mindset that you're consistently prepared to learn.

The other point that I just want to make to help L&D professionals is a lot of these departments that will say, why are you looking at data, won't have data analysis in their job specification. It's not a discrete requirement for particular jobs in an organisation to have an appreciation of data. Everyone needs it. It's increasingly more prevalent. So again, you don't have to defer to people because they feel like they're better at data analysis. What's the guarantee of that? Go in there and try it yourself. But I would say the best way to get into those conversations are, go and speak to the people who are really, really good at it, really, really good at it.

And I think sometimes, there are data science departments. There are planning departments. There are particular operational leaders that see themselves as, and are, very adept analysts. And what I would do in the early days is... You know, I would consider myself pretty competent with numbers, because I've forced myself to be, and I do genuinely enjoy it. You know, this... Don't get me wrong, there are a lot of things that I'm not great at, but numbers, I take a lot of pleasure in. And when I started was, if I... I would sit down and say, this data has been verified by the following people, I've had it verified by the data science department. I've had it verified by these individuals. So the data is correct. And what that is going to do is, it's going to immediately remove the initial challenges around your data is not right.

And what you're doing is storing credibility through process. You don't have to be the world's best analyst, but what you have to do is be incredibly thorough. And if I hit your desk with some information and some data, you best believe that it's been checked by some of the

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brightest minds we have, me certainly not included. But it will verify that what we're going to be talking to you about today is a genuine challenge. So that is an immediate thing, where even if you are not the world's best L&D people, you just need to connect to the right individuals. And it's a great role for that of meeting so many people, go and find the most respected minds there, and go and work with them a little bit, because they will quite quickly teach you how to do this stuff. And quite quickly, that credibility by proxy, you know, that person has checked it, it can quite quickly become, well, Seb checked it, so we know it's right.

Michelle Ockers:

Yep. So I find, one thing I often say to people is, go and find, probably talk to your commercial team or your finance team, find out who prepares the data pack that your senior leadership team looks at least once a month, if not more frequently, to understand the performance of the business, because they will understand the data that drives the business. They will know how metrics are calculated. And you know, they can share that knowledge with you.

So I think that's a good place. Even if you don't have data scientists in your organisation or a data department, find your commercial team or whoever prepares performance metric packs and understands those performance metrics.

Sebastian Tindall:

Go to the source. Just as we say, go to that source. And quite a lot, this is a really simple nuance. It's going to sound like a stupid suggestion, but it's one that genuinely worked for me. You go to senior forums sometimes, and you'll have something to talk about, present, and they'll say, you can go, you know, you've done your slot, you can go if you want. No, I'll stay, I'll stay. Because that is the immediate statement of intent that no, I'm not staying within my domain here. I'm a competent individual that happens to specialise in L&D. I'm not only considering my world, 'cause my world is a cog in a much larger organisational machine. And I'm here to make it run as best as it physically can do. And I think that that statement is something that is such a simple thing you can try as your first step in your next senior forum that you go to.

Michelle Ockers:

So how do you create some space and time for your people to be, I call it going to Gemba, you know, going out to where the work is done to do the observations, you know, is it part of their work process or do you have to create some space and time to allocate, to dedicate, to actually allowing people to build up their understanding of a business area?

Sebastian Tindall:

What's going to Gemba?

Michelle Ockers:

Going to Gemba? Gemba is basically the place where the work is done.

Sebastian Tindall:

Oh, okay.

Michelle Ockers:

It comes out of the lean world, yeah. It's a Japanese word.

Sebastian Tindall:

I love it. I love that.

Michelle Ockers:

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And I'm going to credit Trish Uhl for introducing me to that word. And if you want to follow someone around data, someone who knows her stuff on data, it's Trish. So I'll put a link to... I think, I'll put a link to a conversation I've had with Trish on the podcast before where she talks about some work at Mars Food.

Sebastian Tindall:

I listened to that one. I did listen to that one.

Michelle Ockers:

Yeah, good episode. And I think I've got a link to Trish, a video of her speaking at the Learning Technologies UK Conference several years ago about working with data, which would be a really good resource for anyone who's keen to build up their understanding of where to start with data. So that'll go in the show notes as well. There's a couple of resources to get everyone going.

Sebastian Tindall:

I love it. There we go. Yeah. Resource-led. Yeah. So how do you create the space? So it's really, really difficult, because I would be the first to admit that when people talk about departmental maturity levels, when someone tells you've got over 160 projects a year, you will know that you spend at least 80-90% of your time in a reactive state by necessity. And what that means is that the time to be able to do these things is even more squeezed. So we do live in that world. What we've found, though, is, you can change the dynamic a little bit by saying, you've asked us to do these five things. Okay.

We can quantify a sixth, here, and this sixth feels like it's going to drive significant organisational value. We've only got capacity to do the five, does that sixth come in? And let's look at the data and let's make the business case stack up because they're the ones as operational leaders who are going to prioritise the workflow. You only need to make time to do that once 'cause then, people will start to see the value in actually creating proactive space for you as a department. If you're not given that space, all you do is fill your time with stuff, things that you need to do. Whereas actually, if you can do it in a point, even if it's two weeks, really, I would just say just the analysis piece. And you're presenting your stakeholders with quantifiable organisational challenges, and the worst thing that can happen is they say, "Oh, well, we already knew about that." Well, that's fine. That's absolutely fine, and that means I'm on the right lines.

If they take a keen interest and actually the numbers stack up, well, quite quickly that can move to the top of the list. So it's about utilising sometimes those one-week, two-week blocks when you've just finished a big project. You're really tired. Understandably, you're on that demob high of going, "Brilliant. What's next?" That's when the great stuff for your career happens. And I know that sounds relentless, but those people... And we choose individuals to join our team who have substance and stamina. We want people who want to influence an organisation and want to utilise any of those moments to be able to push that on, 'cause that's the career-defining stuff.

I know what I say to the team is, if you get really good at that, and you have a significant impact on an organisation, hey, you won't be working for me for very long, and that's the difference-maker, is those one, two-week blocks that sometimes you get and then some people will sit back and go, "Woah," or some people will go, "Right. Now is my chance. Now, I'm really going to do it."

Michelle Ockers:

So it sounds like partly, it's mindset as well and the way people think about their role and building that and constantly encouraging that messaging around that as an L&D leader.

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Sebastian Tindall:

Yeah, it is. And. I think also, you have to be careful with your people, that there's times to truly promote that, when somebody has really put the work in and actually went to push that button. And sometimes you need head space, you need to relax, etcetera, etcetera. But I think it's having that opportunity cost and that balance to say to an individual, "This project's being pushed back by two weeks." Now, some people will just go, "Oh, I'll wait." And I'll wait for some things to be defined and the project will be delayed by two weeks. That happens four times a year, that's two months of productivity gone for an individual. So absolutely, it's about using those moments to push on those projects and, you know, time to say, I am not just an individual who does what I'm told, I also proactively seek business value. And I do that in a federal, almost democratised way that says, I'm going to get out there and I'm going to show you that if I am not given something to do, I'm better than I am when I am given something to do.

That's... If anything, create the space and I'll do even more for you. And I think that's a change in perception, which is almost an entrepreneurial view on the L&D role.

Michelle Ockers:

And it sounds like you encourage your people to be entrepreneur. You spoke earlier, and I think this did come up in our first conversation, about how do you... It's not so much sort of... Maybe it is performance metrics, how do you determine the performance or gauge the performance of your people? And you spoke about giving them fairly wide rein to go out and create value in the business.

Sebastian Tindall:

Yeah, as much as possible.

Michelle Ockers:

Yeah.

Sebastian Tindall:

Which is difficult 'cause I think we've got obviously the departmental metrics, that's fine. I think the dream and the view, and if we're... We'll be completely honest and say we're not 100% there yet, we've got some projects where we've gone out proactively, implemented them and generated true organisational impact. I would want every KPI we have as a department at the end of the year to be solely, "Here's what we've recognised as a team. Here's what we've done. Here's how that's influenced the bottom line." So you're completely departing from L&D metrics. L&D metrics are an internal measure from my team, they're not an external measure. They're not sanitised for external consumption because people externally don't necessarily have a true appreciation of the profession, nor should they, and also, why should they care?

Why should they truly care if someone enjoyed X or actually, we managed to do this in 20 minutes and last year we did it in 40 minutes. "Well done, Seb. Great. That's efficiency, blah, blah, blah, blah." They're not interested. What they're actually interested in is how did you improve the performance of my department, and that's where we want the departmental measures to go, and that's influenced in everything that we try and do during the year. I think that's a completely different approach, but it's not alien to an organisation. Continuous improvement teams will do something similar, and they will live and die on the bottom line, and we'll be more value to the business than we cost. Every department should think like that.

Michelle Ockers:

Absolutely. I sometimes get asked by L&D leaders, "How do I measure ROI? How do I do that?" Do you measure ROI or is that something that you don't think is worth measuring?

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And I'm just going to add a little bit to that question, so there's the ROI aspect, and then there's often the question around, "Well, how do I demonstrate... When I'm trying to link my work as an L&D professional to business impact, there's lots of other things that affect the business metrics that I'm trying to influence, how do I actually show that it was my work that made an impact as opposed to something else?" What are your views on that? What does that look like for you?

Sebastian Tindall:

Just one of the most misunderstood pieces of terminology, I think, in an organisation is ROI, and particularly in L&D, I find, is that people... People will seek to demonstrate the impact of their own individual actions, but rarely projects are not so, and that's exactly what you're alluding to. I think that... If a project comes in and it's a huge organisational deployment, the ROI metric should always have been agreed at the outset, otherwise it shouldn't be our project that we're doing right now. So you know that if it's a reactive project that your team are dealing with, ROI you're on the back foot, 'cause that's already been pre-agreed, unless you're in those scoping meetings, and fair play to you, I don't see many on L&D professionals in those. So I think that's the first thing.

I think if you're proactive and you're operating in that space, you're the one identifying the performance challenges and you're the one who's suggesting and agreeing those ROI metrics. You're both the initiator and the evaluator, you're the fate of your own destiny. So I think if you're looking at two ROI, it's proactive performance consulting and finding true organisational value that's going to allow you to do that, not sitting there being a recipient of change, which is... I know it's not an accusation for people, but it's a tough place to be in as a team if you really want to demonstrate your value.

Michelle Ockers:

So... And I'm going to start wrapping up in a moment because I could easily talk for two hours with you here, Seb, I know there's more to cover, but we do need to wrap up pretty soon. How do you, then, if you're going into a conversation with someone at sort of a senior level in the organisation who wants to understand the performance of your team, how do you... What do you say to them? What do you talk about, when you talk about your team's performance?

Sebastian Tindall:

So, we issue a monthly strategy pack, which has got our performance metrics in, how we performed that month, and it's... There's a lot of graphs and measures in there deliberately to mirror organisational performance. So there's a number of layers, and as I say, we are short on time, but I think the reality is, those metrics for us are broken down into efficacy as the headline, what are the things that we're doing to demonstrate that we're becoming more efficient as a department, and what are those efficacy measures which is a cost-income ratio. Pass that point, once you reach efficacy, then we're looking at effectiveness. As a department, how are we impacting the effectiveness of the people around us, and also how are we becoming more effective, so days invested versus actual organisational impact, departmental impact.

And I think once you start to delineate between the two, the L&D measures that you show to people are a hygiene factor only, because that is showing you that we are consistently dedicated to efficiency, minimum input for maximum output from an L&D perspective. But the L&D stream actually has really got the sole purpose of generating performance, so here's how we demonstrate as a department that we're impacting performance, we're doing it in the most efficient way possible, and then at the end of that we're saying, "Right, well, here's how we're effective on a truly organisational scale, on a more global scale, and these are the things that we're doing to demonstrate that."

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So you're almost tying yourself from L&D on the left-hand side, I'm using a lot of hand gestures, [chuckle] but this is going to be a podcast, so forgive me. But you've got L&D left-hand side, hygiene, all the way to organisation on the right, and the real nuance is how you tie that stream together and say you go from L&D to performance, and your metrics should do that.

We've actually done follow-through analysis, and it's a really simple example, I bet many people have done the same, but the reality of the matter is, you're tying through cost-income ratios there by saying, Well, by being more efficient as a department than we were 12 months ago, we can save you this much money, and by doing a quantifiable UX analysis, you can sometimes take like for like processes, and sometimes you can say, well, actually, doing that process more efficiently, we can tell you that it's a reduction in training minutes this far. Therefore, it's saved you this much. Therefore, it's improved service levels by X, Y, Z. That is such a simple example, but anyone can do that, anyone can do that. And I would just start with that simple thread.

Michelle Ockers:

So get started is the key. Often, I say to people, "What tips would you have for somebody to do X, Y, Z?" And the common theme is, "Just start somewhere, just try something and learn from experience. Just get better at it. But don't be afraid to start somewhere." And I guess that's the same... We spent a lot of time talking about metrics and data today, which I hadn't anticipated, so that's been really useful. And I guess knowing that the way you think about the role of learning and development and the tie-in to business performance, that shouldn't really surprise me that you've gone down that path. So Seb, final question for you. If you think back over the past two years since that first conversation we had in 2020, what do you think has been the most valuable thing you've learned as an L&D leader or an L&D professional in that period of time?

Sebastian Tindall:

Definitely from a mistake. I think it was that point that you were obviously alive to a lot early than I was, is that if you go and knock on someone's door and say, "We are going to start genuinely contributing to organisational performance and looking at data," don't assume that door is not going to get slammed in your face, 'cause it is, and it is more often than it's opened. And I think it will help you, although it can feel uncomfortable, it can help you understand where you've got true credibility as a professional or if people see you as an individual who happens to train. And I think it's those make-or-break conversations that you cannot avoid, but don't be afraid if the answer is, "Why are you looking at data?" Because that's the start of the negotiation at that point. But don't assume that it's going to be open arms and come in and look at what you want to, because it's not a human reaction that you should expect, and that was probably my biggest learning, and a mistake, definitely.

Michelle Ockers:

So what advice would you give to someone if they have that reaction when they're asking for access to data, or, "Can I sit down and talk about performance data with you?" And the hand sort of goes up. It's like, "Well, why would you want access to my data?" What tips would you give to someone who's starting down this path and gets that kind of response?

Sebastian Tindall:

Full charm offensive. [chuckle] And you can sort of say, "Well, you know, obviously, you're an individual who analyses organisational data every single day, you'll be truly adept at it. My role is to learn. I genuinely believe that that is a fundamental part of an organisation's success, why I work in this department. Let me come and learn from you. Let me come and sit in these forums and see what your genuine challenges are. I'm not here to spot you're doing anything wrong." And the irony is then they're probably wishing you wouldn't, because they're basically saying, "Well, you probably won't understand the data." Well, it's fine.

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Obviously, I probably wouldn't understand, but I'm going to sit with you, I'm going to learn as much as I can because I need to understand what keeps you awake at night, 'cause if I can, I can be that trusted person who helps to try and head off some of those challenges before they become real problems.

That is exactly why I'm here, that's why I want to help you. And if you don't buy into that, I've obviously got to do more to illustrate that side of relationship, so I think that's the start of the nuance of the conversation.

Michelle Ockers:

Yeah. And I would say to people, every time you get a no, you've actually just pushed the door a little bit further open.

Sebastian Tindall:

Yeah, yeah.

Michelle Ockers:

Till eventually, you get a yes. Eventually, the doors will start to open. So thank you, Sebastian, so much for coming back, and it's just been fascinating to hear how things have evolved, and I guess the digital adoption platforms was a key take-out for me, the way your team works with metrics and building your relationships with the business. So thank you so much for sharing all of those things with us, Seb.

Sebastian Tindall:

Thanks for having me back. Always a pleasure.

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About Learning Uncut

Learning Uncut are learning and development consultants that work with learning teams and/or business leaders to accelerate learning transformation. We specialise in supporting organisations to create or update their learning strategy, enhance their learning team's capabilities, align learning to business value, and implement modern learning approaches.

We are highly collaborative and pragmatic. We partner with organisations to align learning to their business needs, unleash continuous learning, and build capability to help them thrive.

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About your host, Michelle Ockers



Michelle is the founder of Learning Uncut. She is an experienced, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*



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