

Learning Uncut Episode 116
Design Patterns for Learning – Catriona Malcom
Hosted by Michelle Ockers



Michelle Ockers:

Catriona Malcolm (or Cat as she is also known) is the Enterprise Design Practice Lead at Westpac Group. They have a workforce of around 40,000 people across seven business entities whose core service is banking. Cat's role was created four years ago specifically to address the complexity of designing skills development solutions across these seven entities. She has used the idea of design patterns as a way of helping to standardise learning design approaches without being overly prescriptive. As their use of design patterns evolved it was supplemented with other elements to create a design system. This includes what Cat refers to as their 'learning front door' – a way that anyone who is creating learning solutions can connect directly with learning consultants for advice. It's available to anyone in the organisation regardless of whether they are in a formal L&D role, and is a great way to support what is now commonly called 'citizen development' in some circles. They also have an effective L&D Community of Practice in place. We cover a lot of elements of the Westpac approach in this episode and Cat has provided excellent resources - if you'd like to dig deeper you can find these in the show notes.

Michelle Ockers:

Welcome to Learning Uncut, Cat.

Catriona Malcolm:

Thanks so much for having me.

Michelle Ockers:

It's a pleasure. We have heard a little bit about the Westpac learning story in the past, we've had a couple of episodes which I will link to in the show notes, but this is a fresh story about an approach that you've adopted, let's start with an introduction to Westpac for anyone, particularly those outside of Australia who may not be familiar with the organisation. Tell us a bit about the organisation.

Catriona Malcolm:

Well, Westpac is the oldest bank and the first company in Australia. We...

Michelle Ockers:

The first company? Hang on a minute. Really, the first company?

Catriona Malcolm:

The first company in Australia.

Michelle Ockers:

I did not know that. That's interesting. So a long history here Cat.

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Catriona Malcom:

Yeah, more than 200 years of continuous service of the Australian people, and what that means is that we've got a rich history of helping Australians and New Zealanders to create better futures. It also involves a rich history of acquiring other smaller organisations along the way and integrating their people, their values, their processes and their systems into our large, diverse organisation. So we'll talk a bit about the complexity that that creates, and that's why we started to look at design patterns as a way of helping to standardise the way that we were doing our learning.

Michelle Ockers:

Excellent. And, if you have mentioned this, I apologise, but financial services is the sector that Westpac operates in, right?

Catriona Malcom:

Primarily banking.

Michelle Ockers:

Banking, yeah. How large is the workforce?

Catriona Malcom:

Around about 40,000 people, give or take, depending on whether you're talking headcount or FTE.

Michelle Ockers:

And when we say Westpac Group, that means a separate business entity, so it's not just sort of one bank, one bank brand, there's kind of separate sub-entities. Right? How many of those roughly, are we talking about?

Catriona Malcom:

Around about seven different brands.

Michelle Ockers:

Yeah, great. And I think that's pertinent because it leads us into the next question which is, well, what does the L&D function look like across Westpac Group.

Catriona Malcom:

So my role, which is the Enterprise Design Practice Lead, it was created about four years ago, and it was created specifically to address the complexity of delivering learning and development and skills development across seven different brands, and it was a centralised learning and development team at that time, but there was kind of a federated model with people within each of those brands doing initiatives that were appropriate to what the needs of each individual function were. Since then, we've become a distributed model, so no centralised L&D team, we have a very small enterprise capability function, which is where I sit now, which is responsible for learning strategy and some governance, and some really massive enterprise initiatives around capability build and capability frameworks and so on, and so forth.

Michelle Ockers:

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Okay, so what's your relationship then with the rest of these distributed L&D teams? How would you describe that relationship?

Catriona Malcom:

Because we de-centralised a little bit over 12 months ago, we still have quite a lot of contact with the members of our previous centralised team who have gone into each of their individual divisions that are part of the HR function there. We've also built some really good relationships through being consultants to the various brands over the years, and so our federated model, which is distributed, is based on the relationships that we have built up, and then bringing in new players. So there are a whole host of professionals now, who might be subject matter experts. They might be coaches, they might be project change managers, or comms people that are starting to dabble and play in training, learning development spaces that may not have that deep-seated history in learning. And so we're now starting to build relationships more broadly, to make sure that we've got some evidence in foreign practice happening across the Group.

Michelle Ockers:

I know we're going to talk a little bit further later on about Community of Practice, which of course is an evolution of just having relationships, but really when you're talking about, even with your federated model to some extent, but even more so with your distributed model, this presents certain challenges in a large organisation. So what was the key challenge you were trying to address and the outcome you were looking for using design patterns?

Catriona Malcom:

So as I mentioned, my role was created around about four years ago to address the complexity that comes along with building the skills and capabilities of a large diverse workforce over that seven brands that we spoke about. So, at the time there was a centralised L&D team who were responsible for the learning budgets of each of the businesses, but there were still tactical learning initiatives that were financed, owned and run directly by the businesses. What we were really missing where some evidence informed rules for the road, so we needed a common language for all learning professionals whether they were part of the centralised team or whether they were working or consulting to business teams or project teams to really start to surface what good learning looks like? And why, the reasons why those kinds of initiatives and concepts are important in order to help people build their skills on the job as opposed to just consuming a heap of knowledge.

Michelle Ockers:

Yep, which of course doesn't equate to learning as we well know. So talk to us a little more about this idea of design patterns. What is a design pattern? Where has the idea come from to use design patterns?

Catriona Malcom:

That's a really good question. I hadn't actually heard about the term design patterns until relatively recently, but I think it describes what we've done really well, and it was a conversation with some people from RMIT that really surfaced this for me. So the definition that I am using comes from Christopher Alexander in a book from 1977 called *A Pattern Language*, and he was an architect. And the definition is, each pattern describes a problem which occurs over and over again in our environment. And then it describes the core of the solution to that problem in a way that you can use the solution a million times over without

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ever doing it the same way twice. And so the way that we started with this, the very first thing that I did in the job was to pull together all of the instructional designers and the learning professionals that were part of that centralised team, and really not what our design standards were. And so we created these Westpac enterprise design standards that set out exactly what each piece of learning needed to achieve and the things that were absolutely not negotiables for that learning.

Michelle Ockers:

So, Cat, when you think about a design standard in the context of this definition of a design pattern where it describes a problem and then the core of how would you address it. Maybe using one of the design standards as an example, what's the problem that it was trying to address and how does it help to address that problem? Do you have one that you think is particularly effective or useful, one you really like?

Catriona Malcom:

Well, most of these standards are born out of real-world problems that have come along and caused risk for us in our business in one way or another, and so... Let me take an example. Any solution must meet Westpac Accessibility and Inclusion and Diversity standards. And so that should be a non-negotiable as far as I'm concerned, but it means that any piece of learning needs to be available to every single employee of the group, whether they have a neurodiversity need or whether they have any other kind of accessibility need. It could be to do with a screen reader option of the learning, it could be making provision for participants who have got low bandwidths, we've got lots of... Because we're a bank that are all across Australia, we've got branch team members that are in Darwin or Nikatara, and all sorts of, so Christmas Island, for example. So it's making sure that the learning is available and accessible to all and not offensive either. We did have an example of...

Michelle Ockers:

Like culturally offensive for instance. Yeah.

Catriona Malcom:

Yeah, absolutely.

Michelle Ockers:

Yeah, so if we just pause on that for a moment, I can see that... I think you've picked a really nice example that brings this idea to life because there's a clear problem in that some people potentially aren't able to access your learning or that it doesn't cater to the needs of all of your diverse groups of people in the organisation, so there's your problem. And then you've described the core of the solution without being overly prescriptive about what that might look like in terms of how the solution is provided in each instance. So I think it kind of balances really nicely, it's almost like here's the principles or requirements that you need to meet in terms of the core of the solution without being so prescriptive that people in a range of different environments can't use the proposed solution. I think it's a really nice example of thinking about a pattern without being too prescriptive as to exactly what it needs to look like implemented, which will live a fly in a large diverse organisation like your own.

Catriona Malcom:

Absolutely, so another example is all learning should suggest or facilitate opportunities to

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practice on the job or in the community. So there must be practical application, we know that that's important in terms of embedding any kind of behaviour change, but I'm not going to tell you how or why to do that because each context, it's going to be different.¹⁶

Michelle Ockers:

Yeah, yeah. It strikes me as I listen to this as something, as you know, I do a lot of learning strategy work, and as part of any learning strategy we support the L&D team to develop what we call L&D decision principles. Which very much sound like those short statements, and particularly that one you just read out, which are a guideline that allow you then to make specific decisions in any given situation, and they send clear messages about the expectations, about what learning looks like in the organisation. So they feel kind of similar, if I was to relate it to something I already know if people are kind of thinking, well, how does this design pattern... What's different from it, from a design standard or so on, and you've used the language design standard, but what you've recognised when you came across this idea of a design pattern, it strikes me was that you'd struck this balance that what you'd actually describe was the core of the solution without being overly prescriptive about exactly what the solution needed to look like. Yeah?

Catriona Malcom:

Yeah, absolutely.

Michelle Ockers:

So tell me, how did you go about developing these design patterns?

Catriona Malcom:

So like I say, we started off with this set of standards, which really came out of all of the errors that we had noticed that people have made in the past. And we wanted to get ahead of the game and prevent those kinds of errors happening again, and then when we started to write things like, you must meet Westpac's accessibility and inclusion and diversity standards. Well, we have access and inclusion and diversity standards, but how do they play out in learning experience, and we realised that actually, do you know, what we needed to create some inclusive design standards specifically designed for learning experiences. And so that then became another design pattern which talks more specifically around... Well, if you're creating a SCORM package, for example, your SCORM package needs to have transcripts for all of the videos, it needs to have captions that you can switch on and off, and the captions need to be readable against various different types of backgrounds or if you're creating a workshop, we did a lot of focus groups with our people from our Able Action Group, which is the Disability action group within the organisation. One of the things that came up that absolutely stunned me was they told me that I know that I am going to be challenged when I attend a workshop, whether that's a virtual workshop or whether that's a physical in-person workshop.

Often what I'll try to do is to get ahead of the game and do some pre-reading so that I can actually enjoy the experience on the day, but when I ask the facilitator or the logistics person, if I can do some pre-reading they send me the slide deck, and the slide deck eight, doesn't tell me anything about what the content is and why it's important, and what I can do to go and get more additional reading before I attend, but if the reason that I'm asking is because I've got a visual impairment, the slide deck is no good to me. So there's a requirement in our inclusive design guidelines is that we've got to create kind of a run a

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sheet that talks about the core concepts that are going to be spoken about in each session and any supporting resources that are going to be used so that anybody who wants to can do a pre-read and really prepare themselves for what they're going to get and then enjoy the conversation and the discussion and the activities when they attend.

Michelle Ockers:

So some of these, it's almost like these additional resources to help bring the design pattern to life, if you want to apply this design pattern in this context, here's what that could look like, and in this case, you're talking about developing SCORM packages for e-learning, but maybe the way you would apply it. If you're facilitating a virtual session, you need some specific guidance around what that might look like and how to shape that. Is that kind of how it panned out?

Catriona Malcom:

Absolutely. So we've got kind of this overall overarching pattern, which are the design standards, and then to support that, there are additional resources that talk with more detail about how that standard or principle might be applied in various given settings, and again, it gives you guidance about how you might be able to do it, but it's not templated. So the way that that is applied in our St. George brand for the people who are customer facing in the branch will be quite different to the way that that's applied in the Westpac Institutional Bank for people in the dealing room.

Michelle Ockers:

So it's providing guidance as well as flexibility again. Getting that balance right, which is awesome. So for listeners, Cat has kindly provided some samples to help bring some of this to life. And one of the documents you provided, Cat, which will be in the show notes, is a screenshot which shows a list of the different patterns or standards that have been developed. So people are curious around others. You've given some great examples there to bring it to life, but they can see a more extensive list in the show notes. You talked about, "We developed these." Who are we? Who is involved in developing these patterns and some of the resources to support them?

Catriona Malcom:

Well, one of the things that I felt quite strongly about is that I needed to involve the people who actually do the work and actually making the decisions about what went into each of these patterns and what the standards were, and how we might be able to play that out along the way. And so I invited people within the centralised L&D team at the time, but also contract instructional designers, people that were attached to enterprise projects, people within the business who were business coaches to be part of the process. So I do a lot of facilitation in terms of co-design sessions to be able to pull out what's important to the people who are actually doing the work, and then my job is just to translate it and turn it into documentation and pretty pictures, and then also distribute that in a way that's accessible to everybody. And so one of the resources that I've shared with you was a screenshot of our internet page, which has got the list of all of the patterns on it. And if you were on the internet, you could click through and then there would be sort of rich media documents that show diagrams and so on and so forth about how that's applied.

Michelle Ockers:

And this was through, I guess, a series of workshops and a review process as things took

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shape. I like that you've involved probably some people we might not normally think to involve in that list to bring it to life. How have you continued to evolve these design patterns and resources over time?

Catriona Malcom:

Well, I think part of the magic of this is that we did get everybody involved at the beginning, and we've got this Community of Practice that has formed up around that. And I know we're going to talk about Community of Practice in a bit. I proactively review all of these documents on a quarterly basis just to make sure that they're still aligned to Westpac's overall strategy and where the learning strategy is heading, but I also involve the community in the review of the documents, and often what will happen during the course of that quarter is people will call me or people will contact me via our learning front door to ask specific questions about the application for their project.

Catriona Malcom:

And every project is unique and special and different, and sometimes you need to actually just have a bit of a conversation about what's best in what situation for the particular audience. And so often what will happen is that the resources will evolve to address questions that have come up in the last three months, and sometimes our Community of Practice will say, "Hey, you know what, there's a real gap here around this particular area. I think we need to create something," and so I'll facilitate a design session, and they'll come up with it.

So a really good example of that one was, maybe about... Like it would have been about 12 months ago, they said, there's a whole lot of stuff out there on learning needs analysis, but we've got a hold of new people, now that we're distributed, who are starting to create learning that have no experience in L&D. We need to provide them with something that takes all of the best information from Cathy Moore, Nigel Harrison and Arun Pradhan into a Westpac document that will give them a decision tree about how they go about working out where to go and whether learning is actually required in the first place. And so we created that together and then gave them a whole lot of resources to start to make those good decisions, and then a contact through our learning front door. If they want to have a bit of a conversation with an expert about how best to go about running their project, they can have that personal consultation support too.

Michelle Ockers:

Great, but that is a really nice example of what a Community of Practice is there to do with the heart of it, which is to improve practice around an area of common interest, right? And often when I see people setting up, facilitating, managing communities of practice, and I prefer the word facilitation to management, they run maybe lunch and learn sessions, it's more about education, or they use it to communicate out, "Here's a new standard. Here's a new process," whatever, but this idea of co-creation, using the community to improve practice, I think, is at the heart of what really makes a Community of Practice high value. So we've mentioned the Community of Practice a couple of times. Let's go there now. So what's the purpose in some of the key activities of that Community of Practice?

Catriona Malcom:

Well, I think initially, the purpose was to get all of the right people in the room just so that we had a common language. And initially, it was just that I had met a lot of people. I've

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been working for the organisation for over 20 years. I do a lot of connecting people together across the various brands who just didn't know that each other existed. And so it was a way for me to kind of formalise that, and I'm bringing people together. What it's evolved into is, yes, we do run lunch and learn sessions. Our lunch and learn sessions are a combination of practitioners talking about projects that they've completed, where they've got some tangible results that they can share, and their real-life stories including the good, the bad and the ugly of, "This project in the middle was a complete nightmare and I didn't think it was ever going to get to the end. But actually, you know what? We've produced this and that and the next thing, and our people are demonstrating these skills, and the metrics have gone up by X, Y or Z." So we've got those kinds of lunch and learn sessions. We also have those cool design sessions where people will come to me and say, "I think we need to create a new pattern for this or that."

We've also got sessions where we might get an external expert in to talk about something that is maybe not related directly to learning, so it might be about user experience design or marketing, or something that's aligned to the work that we do, but is not learning per se. And then we also have problem-solving sessions, and so we will... If there is a instructional designer, let's say, who is really struggling with finding a solution to a problem that their business has given them, we might get the brains trust together, and we've got people from all of the various brands, different parts of the business, having their insight and input and asking the right questions. Just really prompts the creativity of the person that's actually got the challenge, and they can take that away and do whatever they want with it, or they can then connect individually with somebody who might have more expertise in that area, and then they can kind of run the session, run the program together.

Michelle Ockers:

Great. Sounds like a swarm around a particular challenge that someone is having. So there's some really good examples of value-adding activities to lift practice in an area of interest. One of the terms you used a little while back was the learning front door, so I'm curious about this learning front door. And when people push on the door, where does it take them? Or when I knock on the door...

[laughter]

Catriona Malcom:

That's a great one. That is... I like that. [laughter] So one of the things that we had to do when we became distributed was find a way to let anyone, anyone who might be creating learning, and that can be a people leader, it can be a coach, it might be somebody who's a subject matter expert, who's just really passionate about sharing their insight, or it might be a big enterprise project that's dealing with some sort of regulatory change. We need to find a way for them to connect directly with learning consultants who can provide advice around learning solutions, and also all of our Enablement team.

So our Learning Services team who manage the Learning Management System and actually content in there, look at the learning technologies that we're using. So we've got some in-application guidance systems. How do you get access to that and get an instance of that going rather than creating your traditional program? And/or what happens if you find a piece of content that's just got a broken link in it and you need to update it? Or if you're a participant and you've been enrolled on a workshop and you can't go that day and you

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need to re-enrol.

So we needed to find a place, a big, big, big front door that anybody can push on, and then you will be directed to either self-serve the right solution using some of the resources that we've created as part of our design patterns, if it's to do with creating learning, or we created around about 140 knowledge articles that address the most commonly asked questions. And so if your question is about, "How do I tell you about this broken URL?" There'll be a knowledge article that says, "Okay, click on this link. Tell us what it is, and we'll deal with it from there. Thank you so much for being so proactive." So it's a catch-all in order to kind of triage the various types of inquiries that we might get from participants and also from people who are creating learning experiences.

Michelle Ockers:

It makes me feel like some of the consumer experiences I have where I've got something, I've got an issue with or a challenge with around a particular product or service, and I go... Either I phone them and I've got to get through this menu system and pressing my numbers to find the right person, or I go to a website and first, I'm directed to try to self-help. I search up something, I'm directed to try to self-help, and if I can't find what I want... And I'm not suggesting you would necessarily need a chat bot, but sometimes there's a chat bot who tries to help you, and it's almost like last resort, speak to a person.

So from an experience perspective and how people get directed through, do they literally come to a website as a first point, or is there a phone number they can just ring for help? How does that work to kind of... I don't know if workflow is the right word, but from... If I've got something and I want to find someone to help me with learning or some aspect of learning, either as someone who's developing/delivering learning or as a member of your workforce, 'cause I can see there's two audiences who could knock on your front door, how do I get to the front door and through the front door to the right person?

Catriona Malcom:

So our front door is part of HR service portal, so if you want to find about your leave or payroll or something like that, it's exactly the same place that you would go to ask those kinds of questions. It just happens that you can ask learning-related questions through that same format. And so there is a search function at the top and you type in your question, and if there is a self-service knowledge or article that we have tagged to address those most commonly asked things, you'll get the answer coming up in that knowledge article, and that might be the end of your story. Similar to that consumer-graded experience that you were talking about, but we're trying not to be super frustrating and prevent you from talk to a person. So there's got to be a balance, right?

Michelle Ockers:

Yeah, yeah, yeah. [chuckle] I think half the time, the objective is to make it as hard as possible to get to a person with some of those customer-facing websites.

Catriona Malcom:

Yeah. So that's not what this is about at all.

Michelle Ockers:

Okay, great.

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Catriona Malcom:

What we're trying to do is help people to help themselves in a situation where their inquiry might be time sensitive. We don't want to time out with having to wait to talk to somebody. That's really our primary objective. And if it's a simple thing, you can probably solve it yourself. You just need to be pointed in the right direction.

Michelle Ockers:

Yep, definitely.

Catriona Malcom:

However, if it's more complicated, like I'm creating a brand-new learning experience, we will give you some resources to... We will give you a knowledge article that says, "Awesome, we're really excited to hear that you're creating this learning experience. Any learning experience that you create within the Westpac Group needs to meet our design standards and our design principles. Here's a link to what they are, how to think about what the problem is that you're trying to solve," and then we give you a link to like a pro-forma that will help us to gather as much information as we can in order to direct you to the best specialist to help you. And so the form is very similar to the kind of thing that I heard Sebastian Tindall describe on one of your podcasts episodes, where it asks all of the kind of common performance consulting questions to help the requester think through what it is that they're trying to achieve. What the business metric is that's going to be measured to demonstrate that it's had a result, whether it's regulatory or not, because there's an added layer of complexity around compliance if it is. And then who the audience is, 'cause that's going to have impacts for the way that we deploy whatever solution is that we come up with. Once you've done that, that will then be triaged and the right person who's got the right expertise will actually pick up the phone and call you.

Michelle Ockers:

Okay. So who's doing the triaging, and where are you drawing on the people who are going to do the helping?

Catriona Malcom:

So there is a Learning Services centralised group still, and they do the triaging, so they look at all of the requests daily, they look at the new learning requests in particular and make sure they really understand what it is, and they are the ones who pick up the call and ask about... Have a proper conversation on Teams so that you can see the person and they're not a robot, and they're actually going to help you. And they'll then kind of corral the right troops around your project. And so you might find that if it's a really large project initiative that you want to be running some sort of virtual workshops in association with some e-learning, in association with some resources, or you might need to think about in application learning, we'll get all of the right professionals from the Learning Services team and also from the Enterprise Capability team lined up to support you in a kind of a case meeting where we can talk about what you're trying to achieve, where your deployment is and when. And then all of the things that we know just from experience that you might need to think through in order to achieve the goals that you're looking at, and then we'll work out who needs to support you on going. So you're not on your own, but the front door is kind of the way that you get to those people so that we can get the right people in the right place at the right time to make you successful.

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Michelle Ockers:

So the actual solution development then could be being done by someone who's not an L&D person, but with access to guidance along the way from someone who has the L&D expertise?

Catriona Malcolm:

Yeah, absolutely. And we also spend a bit of time chatting to our business people about whether they need to use a vendor or whether it's something that they can do themselves, whether they've got the skill and expertise to do something like a scorm package or whether, actually, do you know what? It would be better if you go to a professional to come in and help you do that.

Michelle Ockers:

Yeah. Yeah, but it's a nice way of not kind of... Of surfacing where non-L&D people are developing solutions and providing some support to get them right rather than trying to close that down, which of course, you can't do in a big organisation, and it builds your capacity as an organisation to develop high quality learning as well, which I really like.

Catriona Malcolm:

Oh, absolutely. We have lots of conversations where we talk people down off the e-learning ledge, and they come up with solutions themselves with a little bit of prompting. There are much better learning experiences for the participants than a 20-minute e-learn that has lots of practical application and opportunity to talk to peers and all of those good things that we have as part of our standards. So it's actually quite a... It's an empowering kind of place to be.

Michelle Ockers:

Yeah, great. I love that phrase, talking people off the e-learning ledge. I hadn't heard that before, Cat. [laughter] So there's another important aspect of your approach, which has been creating a learning library where people who are developing learning solutions and materials can access all of the assets created across the organisation. What does this look like, this learning library?

Catriona Malcolm:

Well, the learning library is relatively new as a system or a tool, but it's been a long time in the making. So even before I got this job as the enterprise design practice lead, Tony Dunford who you mentioned earlier said in our team meeting one day, we need a taxonomy to categorise all of our learning so that we can find it more easily. And so this was in the days when we were looking at the future of work quite seriously, and those previous podcast episodes that Tony did are talking about that, and we needed a way to enable all of those future skills initiatives, and we sat...

Michelle Ockers:

Cat, when Tony said the word taxonomy, did everybody avert their eyes and not meet his gaze directly in case they were the person who was nominated to do this?

Catriona Malcolm:

Well, there was a little bit of that, because we knew that it was going to be hard work, and

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we actually played with the idea for about a year, because it was hard and...

Michelle Ockers:

So what is a taxonomy? We talk about it, and I have a model in my head of what a taxonomy is. You've been working with one, so yours might be a bit more concrete, but when we talk about a taxonomy, what do we mean? It may be a term that's not quite familiar to people.

Catriona Malcom:

So at it's simplest level, it's a method of being able to categorise and catalogue stuff. And the stuff might be organisms, or it might be skills, or it might be learning experiences, and in my case, it's learning experiences. And the reason that it's so difficult is because learning is such a subjective thing. Everybody uses different language with different definitions for the same word, so it took, I reckon, two years of looking at capability frameworks.

Doing research on search terms that were used within our own Intranet and within external search engines, looking at the search terms that were used in our LMS and our LXP, looking at the vernacular that people at Westpac used to describe a particular skill or talent or attribute, and then bringing all of those together and then coming to an agreement around what we were going to call things without it being so extensive that it was unwieldy. And that took a long time. And so now we have a taxonomy that consists of 12 categories, we've got, I think, last count, there was 135 keywords, and then there's an extra layer that sits within our learning library that tags the metadata on our content for things like, does it mention a specific system that we use? Does it have a key, important person from the group in it?

Does it talk about our purpose, values or behaviours? Does it talk about a particular policy or process? So that we can do a search of all of the metadata in our learning library now and we can bring up every single thing that's been loaded and been loaded well with the metadata tagged of everything that includes our CEO. So when he retires, we can easily find everything that shows and mentions him and upgrade it. Or if there's a particular system that is mentioned that's going to be grandfathered or there's been a system upgrade, we can find everything that mentions that system name and then create a program of work to make sure the maintenance happens effectively.

Michelle Ockers:

And so those metadata tags are not something that people would use in a keyword search to find resources, but they're important for management of the assets and data that is loaded to the system, right?

Catriona Malcom:

It's kind of the forward-facing thing, which are our categories and our keywords, which are what our customers use, the employees at the bank that are using the LMS or are using the Intranet. And so there's the categories, the keywords, and then resource types, and then in the back end, there's all of this additional metadata that we use to manage the content.

Michelle Ockers:

Right. So that means all of this content then is loaded to one place and managed by... 'Cause it takes a lot of discipline to maintain these stuff, right? Once you've got the

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architecture in place... The taxonomy in place to actually apply it and use it properly, so they'd have to be a group of people who are responsible for loading stuff, maintaining the tagging and so on, in a particular storage location. Is that the way it works?

Catriona Malcom:

What we do have is a content management team that are part of our learning services area, and they are responsible for the governance of the learning library, they are the librarians, shall we say, in our learning library. But the people who make the learning are the best people to be able to put the metadata tags on. And so the loading of the content is done by the people who make the content because they are best placed to say, oh yeah, that particular asset mentions this particular system, if we got the content management team to do that, they would spend hours and hours and hours having to review it.

And so what we're trying to do is create efficiency for everyone by having our producers load the content into the system 'cause they know what's happening with it. And then the librarians, the content management team, take over the management and the governance of that, and then we've got a bunch of people who are just searching the learning library, so they may be... They might be instructional designers who are looking to curate content on a particular topic before they start designing something from scratch, because it might be that another part of the business has already solved that problem and they don't have to make anything new. So there's efficiency in surfacing that information. Previous to having the central repository, everything was on shared drives, or somebody's personal drive, nobody knew whether somebody had already done the work before.

And so there was a lot of duplication of effort. We're trying to alleviate that much to create efficiency, but also we spent a lot of time doing investigations for our legal and compliance teams because there had been a regulatory request or something like that. And that would take weeks and weeks and weeks and weeks, to try and surface all the content related to something. We've reduced that now to the press of a button so it can take 10 minutes for a really big search to go through as opposed to four weeks.

Michelle Ockers:

So Cat, you've just described really elegantly at a practical level, something I often talk to learning teams about, about this idea, and I've been using language, which maybe I'll change the language I've been using about you have to have an information architecture and maybe just saying that you need a taxonomy so that you can discover things in a consistent and easy way. So what I will be doing from my perspective is taking a little sub-extract of that explanation you've got creating a separate resource for the transcript and sharing that with teams I work with. Because I think you've just given a brilliant example at a practical level of why you have a taxonomy and how you can use it and what the benefits of it. So thank you very much for that, that was great.

So Cat, we've talked about design patterns as a start point, but also to bring these to life to which if some of those bigger outcomes around supporting and equipping people to create great learning in such a big organisation when not all of them are L&D people. We also talked about the role of the Community of Practice, about your learning front door and the support available through the front door in your learning library. You've been in the role five years. So is this sort of a body of work that shaped over those five years to pull all of this together?

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Catriona Malcom:

Yeah, absolutely, this has grown with me and the role and the relationships that I have built over that time. And it looks quite different to what I did in the early days, and I think it will continue to evolve. I reckon, I've got the best job in the world, and that my job is to go and look at external research, go and find out what's happening out in the broader world of work. I'm not going to limit myself to just the L&D. I'm bring that knowledge back into the organisation and then translate it for people in many ways that they will understand that's kind of Westpac specific. And then just make connections and make contacts and chat to people and consult. And from time to time, I'll consult to a really large enterprise project and help them to apply all of these principles and actually deploy the thing really efficiently as well, but there's lots of variation and lots of opportunity for making a difference and creating better futures too.

Michelle Ockers:

Yeah, absolutely. Let me know if you're looking for someone to take that job. That sounds awesome. So Cat, when you think back of this body of work that's evolved, and you can sit back... You can sit here now and look in the rear vision mirror and see how it's taken shape, but of course, when you see that the start of the journey, you maybe don't see where it's going to go, but when you look back over this body of work that you've stewarded in the organisation over the last five years, what are some of the key lessons you think you personally have learned along the way?

Catriona Malcom:

I think to be open to suggestions. When I first started working with the standards and the resources, I was very... I was very invested in them because I had to actually... For example, I've been talking about the Inclusive Design Guidelines. I didn't know much about accessibility when I started that, I really had to partner with our access and inclusion team and build my skills up to scratch. And so when somebody asked me a question about the documents, I would get quite defensive about them because I've invested so much in them. Now, I realize that actually they're part of a community, they're not mine. And so I've been able to let go and actually let them evolve as they've needed to without that kind of defensive feel around... Of course, they're right, I've checked it. So I think I've personally grown and kind of let go a little bit of the reins of all of the resources and documents that I've produced.

I think also just bringing that community together and helping to facilitate the people, I'm now at the stage that they don't need to be managed. You said you didn't like the word manager. I'm not the ringmaster of that anymore, it's kind of taken its own... It's got a life of its own now. And actually, I probably don't need to be involved in it at all if I didn't want to be. I do want to be 'cause I enjoy it, but if I wasn't there tomorrow and I've decided that I was going to go over season, have a fabulous time, they'd manage just fine without me. And that's also a letting go experience, but it's a blossoming, flourishing thing that I've experienced.

Michelle Ockers:

Of course, it means things are sustainable and they will outlive you as an individual in the organisation, and your legacy lives on or the legacy of this body of work you've helped co-create across a whole group of people. So that's the goal. We don't want to make

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ourselves indispensable, do we? So that the hard work we put in falls apart when we're not there anymore. So Cat, are there any other tips you have for people who want to get started with using design patterns?

Catriona Malcom:

So I think probably the best way to start is with a set of design principles or design standards, so we have both. I started with the standards who are very kind of rule based, the Community of Practice that actually can we have some design principles that are a little bit more kind of high level and airy fairy. So we co-created them together afterwards, but definitely starting with getting that common language. So get the people together in a room and decide on what your rules for the road are and what's important to you as an organisation because what I've got and I've shared as part of the resource is you will be able to lift and drop some of those, but some of them are very specific to the way that we work or the vernacular that we use, and you need people to have the ownership of that. So that's where I would start, and you'll find the other things fall off the back of that because people will be asking for support to actually use those principles in real life.

Michelle Ockers:

Fantastic, Cat, thank you so much for coming and sharing your experience over this impressive body of work over the last five years. We're going to include a link to your LinkedIn profile in the show notes if anyone would like to get in touch with you to find out more about the topics discussed in the episode. And just a reminder to listeners to check out some of the resources in the show notes that will bring some of the things we've talked about today to life. Thank you so much, Cat.

Catriona Malcom: That's a pleasure.



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.

Learn more about us [at our website](#).

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

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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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