

**Learning Uncut Episode 66**  
**Sebastian Tindall – Resource-led learning strategy**  
**Hosted by Michelle Ockers**



**Michelle Ockers:**

If you are interested in performance support and learning in the flow of work this is a must listen episode of Learning Uncut. Sebastian Tindall, the Head of Learning and Development at Vitality joins me to discuss their resource-led approach to learning and performance. Vitality is a UK based health insurance provider whose business model incentivises their customers to take an active role in managing their wellness. This model results in a large volume of product change, and the demand on the Learning and Development team has gone from having to support 14 projects a year in 2017 to 83 projects in 2020.

Two and a half years ago Sebastian and his team realised that there had to be a better way to enable their 1,000 frontline workers to perform in this dynamic environment than classroom training. However, there was no ready-made framework that they could pick up and use. Instead they've had to create a custom learning framework for workflow learning. Sebastian describes their 4Ps approach – Prepare, Practice, Perform and Perfect. He tells the story of how they created the approach and what they learned along the way. A resource-led approach has enabled them to achieve a learning project turnaround time to 7 working days, decrease training minutes required by 17% and increase all evaluation metrics.

After we ended the recording Sebastian shared with me that he is seeking to connect with others that are further along the path of implementing a performance support approach than Vitality. If you have a mature approach please reach out to Sebastian using his LinkedIn profile which is in the show notes.

Sebastian was one of our fabulous guests in the Emergent series of Learning Uncut, which explored how learning professionals can emerge stronger and more relevant from the pandemic. In mid-February 2021 you have the opportunity to join the Emergent co-hosts and some of our guests in a series of practical workshops called the Emerging Stronger Summit. We will work together to identify practical actions you can take as a learning professional to address business challenges. If this sounds useful to you please use the link in the show notes for more information about the Emerging Stronger Summit.

**Michelle Ockers:**

Hello, Sebastian, welcome back to Learning Uncut.

**Sebastian Tindall:**

Hi, Michelle. Thanks for having me.

**Michelle Ockers:**

I was too curious not to have you back after our Emergent episode where we were talking about building capability for L&D and I was aware of some of the work that you've done at Vitality with your resource led approach, which I thought would make a great case study to focus in on. So thanks for being here to tell us this story today.

**Sebastian Tindall:**

Pleasure.

**Michelle Ockers:**

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### Sebastian Tindall – Resource-led learning strategy

So let's start by setting context. Can you please introduce us to Vitality? Who are the organization? What do you do and who do you do it for?

#### Sebastian Tindall:

Yeah, sure. It's definitely a good place to start. So Vitality in a typical insurance business, so it operates a shared value model, which aims to make members lives healthier. Which sounds like a nice corporate line, but let me reassure you it's actually fundamental to the business model. So like most private health organizations, there's a better health element, which helps with you with getting better. Whether we're seeing a doctor or physiotherapists, but the key element for us and the differentiator is we have a selection of partners to engineer rewards, who create kind of lasting behavioural change with our members. And to give you an example with Vitality, you can essentially get an Apple watch for free if you hit your weekly activity targets. You can also get things like free coffees, discounts of gym membership, and the list goes on there.

#### Sebastian Tindall:

They're specifically engineered to get our members to engage and live a healthier lifestyle. For those that are interested, there was a Rand study, that was distributed about two years ago, which demonstrated that our members were 36% more active after engaging with our rewards. And I guess the point really is, where am I going in terms of L&D? Well, because there's such a range of contexts that come into our business, it can range from what's the APR on my healthy credit card to what's the latest status on my hip osteoarthritis. They say kind of great actors have great range. Well that's kind of great ranges for as it goes. And I think for us, it means that if a new medical treatment is implemented, there's some new cancer cover, there's a new Apple Watch release and on the Cupertino briefing, that Apple do. A new gym opens, our staff members need to know about it pretty much immediately.

#### Sebastian Tindall:

And we don't really have control over those announcements. It's not like we can call up Apple and tell them to delay the release of the new Apple Watch. So a lot of that work works in terms of complexity, but also accentuates the speed required. We've got sort of nigh on a thousand frontline customer service call numbers which are spread across the UK. And very much in that world, customer levels are absolutely king. And if you're not answering your call to a member in their time of need, then we aren't delivering what we committed to do. In fact, we're permitted sort of an absolute maximum of 140 minutes of training time a month per advisor, which might sound a lot but when you've got five significant really roll altering changes landing each month, it's quite frankly not enough. I think that for us sets the table for kind of my day to day environment and in Vitality.

#### Michelle Ockers:

So before we talk about the business a little bit more, I want to know one thing, Sebastian, when are you coming to Australia? It sounds like my kind of health insurer.

#### Sebastian Tindall:

I was going to say with, with all the CrossFit you're doing, then absolutely probably making a net profit on it. It's funny the amount of people that speak to us and just say, "What's the catch." And I think the irony is there isn't a catch. I think the reality is the shared value model is a real thing. If you're healthy and you're living a good lifestyle, you're by proxy less likely claim on the policy anyway. So actually it's good for you. It's good for us. And we've seen some amazing stories from members and even staff members who've joined our business and engage with the product and have lost a lot of weight, taking up exercised and Couch to 5K. And I've got to be honest, that for me is something that I find really inspiring about

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working at Vitality. Because when I first joined, you join with some scepticism, and you think is this real? And now it really is and I'm proud to say that I'm working there.

#### Michelle Ockers:

So speaking of when you first joined, that was about four and a half years ago, can you recall your early impressions of the organization and its operating environment?

#### Sebastian Tindall:

Yeah, I can. I've worked in very structured businesses beforehand, sort of typical financial institutions at Sun Sunday and Co-operative Bank. And those were great in their own ways, but Vitality is about as far removed as you can ever be from those places. I think Vitality is... some of the founder mentality is at the maximum value out of any project's achieved in the last 10 meters. And I think that's amazing, but also when you work in an L&D role, it's also super difficult because things are changing up until the nth hour and I guess it was a bit of a struggle to begin with because your gut tells you that you need to provide a cut-off and say, "Now that's kind of it now." We've got to let people know because it's going live in an hour, but can you really restrict the entrepreneurial brilliance that's happening behind the scenes to create these products?

#### Sebastian Tindall:

And I think that was a bit of a wrestle for me to begin with because, traditional business environments, it was just a lot easier to administer learning. I think quite quickly, I had to embrace that change and sort of say, "Well, actually, how can this be good for me?" And it was tough for the first few months. It was really, really tough. And there was times where I sat there and just thought, I don't really know how I'm going to do this, but I think, for me, I just wanted to say, well, I'm going to give it a really good go and if it doesn't work out, it doesn't work out. And I think it's been great for me to sort of lean into that change and just think what value can I get out of it? And it's been really good from a thinking.

#### Michelle Ockers:

So what was happening with learning when you joined the organization? Were you the first learning and development person was there already a team built, what did you walk into and what was happening?

#### Sebastian Tindall:

There was a very small team of three people and the L&D manager handed in their notice, prior to me joining. So I think, for us, there was not a great deal of structure because with the best respects, we were telling the L&D manager, he'd spent a lot of time delivering. So he didn't always have the chance to come back and do some of the structure stuff. And, you know the staff that was in the team, there were some good fundamentals and some good principles, but some of the challenges that I saw were, the team was undersized, sort of three people. We've actually grown now to 16 individuals in the space of four years, which now I appreciate. FTE doesn't sound massive, but proportionately it's a very big growth in a team.

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### Sebastian Tindall:

No training was delivered digitally, so everything was solely classroom and waterfall at that time. Again, kind of struggled in terms of, there was one or two people who'd come from frontline roles and a couple of people who had significant experience in L&D. So it was kind of a difficult set of backgrounds, almost mesh for people. So yeah, there was probably quite a few challenges that we saw at the time, but I think definite potential for growth and to almost take that function to the next level and improve the agility.

### Michelle Ockers:

So, what you described to us is a really dynamic environment with a lot of product change because of this range and you're very different and the shared value model and what that means for customer service and the offering. You've talked to us about, a more kind of traditional looking approach to L&D four and a half years ago. Has there been, the environment you've described to us where you've got five significant changes per month and a limit of 140 minutes of training time per advisor per month, has that changed in the last four and a half years? Has the rate of product change increased, was the environment as dynamic and if so, how on earth did you ever keep up with a waterfall approach and a lot of delivery with a facilitator there?

### Sebastian Tindall:

In 2017, our team delivered 14 projects. This year, it's going to be 83, right? So the rate of change is significant. And when we look at the per project delivery, each individual trainer in 2017 was delivering about five projects per year. And at the moment, now we're on a rate of two projects per month per person. So I think typically speaking, you would swell your team and that would swallow the capacity that you're behind. But actually, because we've combined that with efficiency changes quite quickly, you kind of get some exponential growth in terms of your capacity. And I think it just, to begin with, it's very hard to project the next 12 months of activity, because all of this stuff is very closely guarded and under strict NDAs. So you couldn't sit down with the R&D team and go, "Hey, what are you going to launch over the next 12 months?" Because the reality is that's not how they operate. It's a reactive model to things that happen in the market, and you can't always plan for amazing ideas. So the reality...

### Michelle Ockers:

How much lead time do you get then in advance of something going live? How long before you have to make sure people know about it, know what they're doing with it? Are you aware that it's happening?

### Sebastian Tindall:

Sometimes it's the Friday before the Monday. Sometimes we might get four or five weeks notice, but when I say four, five weeks notice, we'll know the principle of what's coming, but again, the processes won't be defined and for us, that's, again, represents difficulties and additions to our processes to go, "That's great. Sounds fantastic. How's it going to work?" Well, we don't know yet. And that's when we have to start facilitating those discussions to quite quickly come up with a solution.

### Michelle Ockers:

Yeah. So, I will come back to the question around governance and capacity management later on, but for now, let's just stick with kind of the delivery model, if you like. And I know that you've adopted a resource-led approach. Let's talk about what that looks like and then perhaps followed the journey through from where you were four and a half years ago

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through the kind of shifts you had to make to be able to take a resource-led approach. So what does a resource-led approach look like at Vitality?

#### Sebastian Tindall:

So for us performance-led, is a resource-led performance support. So what we'll always do is break apart our pro structured meetings with stakeholders and identify the most critical parts of the things we want people to do differently. And again, in those meetings, it's an important dynamic change because what we found in the early days, we would kind of say, "That's great, but we haven't got everything to train people with." Then it would start this question again. Well, what do you need? And then suddenly you're almost in this strange... because I'm kind of blocking this happening and now I need to tell you everything that people need to know, and actually that should be a collaboration. So again, those meetings are very structured as a set process called rapid task analysis. And what we'll do is just make sure that once we've all agreed on the critical tasks, and we're not saying that everything else is unimportant, but those are the absolute things. If they do not happen, this thing will not land.

#### Sebastian Tindall:

We prioritize them to create performance, support resources around, and again, to give people a classic example. So we could probably train people for nine hours on lots of what if scenarios on issue resolution. A customer calls that we've got an Apple Watch for iOS 13, and they're on an iPhone Se, what do you do? And it's just absolutely not practical to teach people about all of these what if scenarios? So then it became more about teaching them how to find the answer to these issues in the moment. And if we can create a simple table where you just select the iOS type, the watch, and then what you've got to do to resolve it, then that's a far better investment of our time. And we can just spend maybe an hour spread across three learning events to get you to use that table in specific scenarios. And then if something changes, a new iOS comes out, all we need to do is update that table and it's available immediately that second. And I think for us...

#### Michelle Ockers:

Training the resource, rather than training the answer, if you like. The task is how to use the resource. That's what you're training them to do.

#### Sebastian Tindall:

Absolutely right. Yeah, absolutely right. And I think the departure point for us is how do you support this without training people? And we actually target our individuals, our T&D specialists on training people less that's the actual target. So on a yearly basis, they need to keep the minutes down per project while still maintaining the same evaluation metrics. And it's been amazing some of the things that people have done. And increasingly we're getting to the point where the answer is no training required.

#### Michelle Ockers:

Yep. Yep. So can we step back one to talk about this rapid task analysis. I'm familiar with diff analysis, difficulty importance frequency, is it the same kind of approach? Or you want to break it down and talk us through what you do in a rapid task analysis?

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#### Sebastian Tindall:

Yeah, so it's a similar approach, but I think what it's really helped us to do is communicate best with stakeholders. And I think people would hand over process maps and say, "That's what a staff member does," but then they're at a level which a new starter could not understand. They would be like, "Open this application." Yeah. But how do you actually do that? So what we actually do is we will differentiate between a task and a task is a set of steps and a step is something you specifically have to do, click this button, do this, do this, do this, and a concept. And a concept is something that you need to know to enable you to do those things. And I think by going through this process, you kind of lay back absolutely everything that people are going to need to do differently in their role.

#### Sebastian Tindall:

And you can also quantify how concept heavy something is and how action heavy something is. And you can also quickly identify a couple of gaps. So we can have that meeting a couple of hours, turn around and say, "Okay, there's about six things that haven't been defined yet, define those things, we can clear them in the learning experience." If you haven't defined them, we can still proceed, but there will be some ambiguity about what people have to do. And do you accept the risks of doing that? I think at that point we could partner and detach very quickly, give people the guidance of what they need and the gaps they need to fill. And we can go and pick up something else and you just join in different parts of that, that kind of project stream each time. And it works, works very well for us here.

#### Michelle Ockers:

Okay. So if I can repeat back what I think you told us, then make sure I'm on the right wavelength. You take a process, there'll be a process defined, and then you look at the process and you pull out what are the tasks and what are the steps and the tasks and what are the concepts that need to be understood to enable people to do these tasks?

#### Sebastian Tindall:

Yes. Absolutely right.

#### Michelle Ockers:

So at that point you've got concepts and you've got tasks with action steps. What is your treatment of the two in terms of how you then make decisions around, how you support performance or how you enable learning? Maybe if we start with... well, I don't mind whether you want to start with concepts or whether you want to start with the actions or the tasks.

#### Sebastian Tindall:

Sure. So I guess when you've got the process laid back, we will make a decision at that point. It's discretionary to say, have we got enough to proceed to the next stage here and figure out a solution with you. If there are significant things, outstanding, real crucial items that haven't been defined yet, we will have to make that decision that point and say, "We can't help you with this just yet. You need to go and define it," but quite quickly and our people will come back with those answers and you can kind of progress. So there's kind of a decision to be made once you've got everything in front of you to say, "Do we understand it? And could somebody understand this process." What we'll then do is identify any associated skillsets that exist. So what knowledge are you building on?

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### Sebastian Tindall:

What foundational knowledge do people need to be able to apply this? Are there any existing processes that are similar to this that we can help relate? And that helps us to almost bunch the process in with things they do in their day-to-day role. And that's fantastic to help us identify if we're going to place a resource, where do these things happen in your day-to-day workflow? And actually, how does that relate in almost a chronology of you? I log onto my computer. I open this, I do this, whereabouts are you going to need to get supported? Then after that, we'll take all the critical tasks and we'll put them through our delivery model, which is a four-step delivery model, which is customer of Vitality is the 4Ps. So it's prepare, practice, perform and perfect.

### Sebastian Tindall:

And that the reason why that works for us is quite often, if the processes haven't been defined, we still want to make people aware of the crucial change that's coming. So we'll prepare them with some context, everything we know at this stage, which is great because it limits the content because you don't know everything, but it also helps with the change management of the process. We also then allow you to practice with some real scenarios in the workflow. So typically, 98% of what we do uses digital in part because of the agility that enables. Some people can make the argument that's too much. I completely respect that, but we kind of are what we need to be in these instances. And essentially that might be an e-learning package, very basic, that just acts as a shell. And it says, "Go on to our knowledge base search for this."

### Sebastian Tindall:

There's some information, come back, you do a test, here's a scenario, go back, use the resources, come back. How would you answer this? How would you do that? And quite quickly, you almost scramble that in and open to a board because you're probably never going to use it again. So we put strict design time limits on that e-learning because the reality is it quickly becomes useless.

### Michelle Ockers:

It's disposable.

### Sebastian Tindall:

It's disposable, it's almost a waste of not a waste of time, but the aesthetics are certainly a waste of time to us. And we actually spend the majority of our time designing those resources and making them as ergonomic as possible because long after the learning is finished, you're only left with your imperfect memory. So those performance resources are the things that are going to keep it real for you. When they perform the role, what we're doing in the background typically is looking at people's interaction with these resources. And fortunately, SharePoint does get a bad reputation in L&D and I can understand why, but some of the stats and the data it can pull out are brilliant, so we'll look after it's gone live. What are people searching for? And actually sometimes our projects have different names, code names, and that's how the project is known until it's announced to the market.

### Sebastian Tindall:

So we have to sit there and say, "Actually, people are searching for the project name and not the thing. So can we tie those search terms together? And does it come up first?" Okay, well, people are getting something wrong about this hip condition. Okay, well, let's put that at the very top of the resource. So the minute you click on it, that's the first thing that comes up. And we're working in the background behind the scenes to push these things to people at the right time to make sure that we're almost correcting that performance.

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### Michelle Ockers:

Yeah. This is such a nice example of the discipline of information architecture being used and understanding how people are looking for things, what they're looking for and then making things more accessible using that understanding. Really good example.

### Sebastian Tindall:

It's amazing and I think some of the people that work in our team, some of the ideas are just... they're so clever taking this stuff to the next level. I mean, even to the point where the first thing that we'll do, and usually when people come into a session or we do a digital session, is we'll just embed a question to say, if you were going to search for help on this thing, what would you search for? And immediately in that prepare stage, you know what to label it, and then you can kind of help ask a few more questions, like, what are you really worried about here? And actually what would cause you to break out in a sweat if a member asked you this question?

### Sebastian Tindall:

Well, okay, we can make sure that's there that day when you actually perform it for real. So you can almost get the end users feedback digitally in an asynchronous way to shape the content that's going to be there when we launch...

### Michelle Ockers:

You're literally asking these questions in a digital environment, then taking that data set that you've gathered through the digital delivery and then using that to inform decisions around the performance stage and how you shape the research. Amazing. Yeah.

### Sebastian Tindall:

Not my idea. I must confess that was a guy and I was amazed, there is a guy on my team and we were already doing things like testing and analysing the testing, but the guy who came up with that had been in L&D for six months at that time. And he previously was working in a frontline role and it just... you can set these principles for people, but you're just constantly amazed by when someone comes in with a fresh perspective like that.

### Michelle Ockers:

That makes so much sense though, doesn't it?

### Sebastian Tindall:

Doesn't it just, but they're not encumbered with tradition. That's the beauty of it.

### Michelle Ockers:

Yes. And I would encourage anyone who's listening to this who hasn't gone and listened to the episode from the Emergent episode, a series that Sebastian and I did together, to go and listen to that, to understand a bit more about the composition of Sebastian's team and the kind of skill set, because it is a non-traditional skillset and what that's enabled you to do. There's some good stories in that episode and I'll put that in the show notes, but different thinking, different perspectives, fresh eyes on things is what I took away from what you've got in your team with not having a lot of people with a traditional L&D background, Sebastian.

### Sebastian Tindall:

Yeah. So nine out of 11 people, we've grown the team with over the last three years, have all come from frontline roles. And I think was that the master plan to begin with, quite

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possibly not. We were really struggling demand wise to keep up with the constant change. And actually we thought, well, okay, let's bring some people into the team. And that swell like demand and see how they get along. And I brought the first person in, and actually they did a fantastic job and they picked up digital learning so quickly. And I just looked at it and thought, this is not an arcane science. I respect our profession and I love it.

#### Sebastian Tindall:

I'm very thankful to be working in it, but quite often people make out through more difficult than it actually is. And I think, this reality is you're trying to get people to perform in their role and who better to be able to provide some advice or insight than somebody who's actually done the job on a regular basis. And I think that for us it was really useful in that shift to performance support because they could bring all of the gripes and frustrations and we could fix them in the background and actually it would make everyone's life better.

#### Michelle Ockers:

Well, they know the workflow and they know your operational systems as well, right. In terms of figuring out where to place things and at what point might people want to draw on things.

#### Sebastian Tindall:

And then they also know the people, something so relatable about someone that used to sit next to you, helping you do your role and admittedly, a lot of its digital, but even when we produce digital learning, you can see who's produced it. There's the image, the name of the individual to make it relatable. I think we've just found that people internally are culturally aligned and they understand why Vitality operates in the way that it does. And rather than resist that because you would consider that quite a tough culture to do, to be an L&D consultancy. And they've already embraced that. And they've been working here for a period of time. So the question's not, how do you make L&D survive in this business? It's actually, how can this culture be fantastic for L&D? And actually that for us is, is just an amazing thing to bring into the team on a regular basis.

#### Michelle Ockers:

So I've got one more question about the performance stage. I have used SharePoint in the past when I used to have this saying about, technology and tools. If you can't be with the one you love, then love the one you're with. So I kind of learned to love SharePoint. I just embraced it and thought, what can I do with this tool? But I've found the same with other tools we had, like work tools it's like getting curious and the team got curious about what could we do with this tool, before we start trying to invest in new tools.

#### Michelle Ockers:

So I have delivered programs through, or designed and delivered programs through SharePoint. In terms of the analytics that you're using, did you hook up Google Analytics to SharePoint for that? It's been a while since I use SharePoint or is there some other way for anyone who is using SharePoint and kind of wants to know, well, how do I get that kind of information out of SharePoint around what people are searching on and things like that.

#### Sebastian Tindall:

We stay with slightly more rudimentary statistics for something like that. What we'll do is we'll look at an eight week cut of the resource access. So we'll kind of say, on a line graph, there is... let's for argument's sake say that table about issue resolution for Apple Watches. Each stage, there's a four-stage delivery typically. You can see a spike in access to resources. And then what we're looking for is a sustained use of those resources for the first couple of weeks after perform, after go live. And then we want to see that dissipate, which for a

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number of people is kind of counter intuitive, but people will say, "Well, you want them always using the resource?" Well, no, you want them to learn by using the resource and then you want them to rely on it less.

#### Sebastian Tindall:

And that took us a while to get ahead around rarely. But again, we're just saying, what did you search for? What did you click on? Can we get residence time on the page? Or how long are you spending on that page? And that can help us get some heat maps of if you're spending more than a couple of minutes, get into that, then it's probably not doing the job for you. We'll always monitor clicks. So how many clicks does it take you to get this information from cold? And there is a team that helps us with what we call the knowledge base, which they probably call other names in other businesses in terms of putting out resources and working quite quickly to help us rectify some of this stuff. And that they'll always do their own separate reporting, but for us, it's very much about each individual change.

#### Sebastian Tindall:

What are people using? What are they still struggling with after that point? And we can almost tie in performance metrics of core handling stats, et cetera, et cetera, to people are still searching for this one thing a lot of the time, okay, well, no one gets it right every time. L&D is no different. We are completely fallible just as other department is. So don't just do a training rollout and assume that you've got it perfectly right, because no one ever does. So how can you then deliver something to make sure that people understand that gap can be filled.

#### Sebastian Tindall:

It might be a piece of digital learning. It might be something as simple as put a pop-up in a box in the computer that just says, "People get this wrong at this stage. This looks like one of those cases. So don't just click on, make sure you read this box." And sometimes you are limited by the packages that you use, but Salesforce for example has got something called in-app guidance. And for three days, four days, whatever you choose, for every person that lands on a particular page, you can just pop up a message and just say, don't forget to do this. And for me is, don't do any training. Don't need to, everyone will get that message over the course of three days and they won't take any time out of their role and a remind them when they need it. So let's do that.

#### Michelle Ockers:

So what forms, you've talked about tables, you've talked in-app popups - what forms do the performance resources take? What range of formats do you use?

#### Sebastian Tindall:

We made a few, well, a number of mistakes in the early days we used to kind of go, well, what does everyone love when they've been to a training event? Well, they love a manual. They love it, and they're going to live through it and it's going to be 70 pages and it's going to be great. And then we were just like, "Oh no," now we've got that a little bit wrong. So typically speaking, we'll rely on texts or we might use gifs, which is just simple, easy play videos that just roll again and again, which are embedded in the page. What sometimes we can use is just simple screenshots. But I guess the rule of thumb for us is not to be limited by whatever format we choose is what's ever going to be most effective in that time period.

#### Sebastian Tindall:

We're trying to avoid the ability, also the requirement to scroll down the page. So again, that's quite difficult because it's just going to be there in front of you, that's going to save

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precious time for you to get to that resource. So we're really trying to condense down all of that stuff into the most salient message possible. And again, the beauty of text is in time what we're looking to do is hopefully integrate some of this stuff into, Salesforce. So then it can scrape the text and actually present them to you in kind of real time help articles.

### Sebastian Tindall:

So rather than being somewhere that one of the agents has to go to every time, Salesforce can start to recognize what you're doing a little bit more and the knowledge management team at Vitality have done a great job of kind of pushing that agenda forward. Because I think to begin with, my team almost getting a little bit too experimental and putting things like articulate storyline, widgets in, and it was looking great, but actually you don't need that. You just need the text to be able to do your job. And I think for us simple is definitely better.

### Michelle Ockers:

Yep. Yep. I think there's a nice message into simpler is better. So perfect was the final P in your 4Ps, what does the perfect stage look like?

### Sebastian Tindall:

So for us, what I've always found really interesting is we'll evaluate obviously throughout the deployment and the perfect stage is something that has been difficult to define for people because everyone just assumes, well, we'll just do another 20 minute e-learning and it also kind of tell you that you did a great job, but maybe you need to concentrate on this thing. And we've really had to change the thinking around that to say perfect stage is a placeholder. And at that point, if we've done our evaluation and we say, here are the success metrics and the evaluation is typically through, core statistics, observations, manager observations. We have a system which gets live real-time customer feedback, and we can incorporate all of that into it, and we can say, look, here is what we're still perceiving to be the issue here.

### Sebastian Tindall:

Here's the data that backs that up. What is the best way of closing that gap? And I think part of that for us can be just as we said, it might be a piece of learning that's required, but typically speaking, we've noticed that people will almost use the resources to continually perfect their performance throughout. So it might be that we'd go and actually revisit the resources that we create instead, feedback is they're not actually as easy to use as you want them to be.

### Sebastian Tindall:

So perfect stage might be a communication to say, you said that that calculate wasn't very easy to use what we fixed it. Make sure you use that calculator. I think the reality for us is that is a catch-all. If you don't get things right all the time and it might be, "Hey, we got this completely wrong. We need to do this all again." But the evaluation informs what you go into the perfect stage. And actually whether we need to actually start this whole process again.

### Michelle Ockers:

So obviously you're gathering operational data as part of the evaluation. Where does the use of feedback come from? How do you do that?

### Sebastian Tindall:

Yeah, so we we'll usually sit in the operation with individuals and we issue, kind of staggered surveys for people. The surveys generally have the same theme. It's kind of like, you're

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preparing for this change. What are you worried about? What's going to give you cold sweats. If you're going to search for it, what would you search for, if you had to go live right now, would you actually be prepared? And the reality is they're not going to go live right now, but people quite voice it for us and make sure that the actual an e-learning event or any resource includes this information. Again at performance stage, we'll say, "Right, you've been doing it for two weeks now, were you actually prepared? Do you know where to go if you got stuck and what else do you need?"

#### **Sebastian Tindall:**

And we're always throughout that process, you're kind of hopefully declining the number of kind of concerns and issues. And then when you go to the perfect stage, again, it's quite simple for people to say, we'll generally try and draw out some more of the more complex scenarios because at the performance stage, you're not necessarily ready to give you every single what if scenario, it just, it's going to blow your mind, but the perfect for us, it's more about, okay, well, nobody knew this scenario is going to come up. Are you now pretty comfortable with this and ironically by asking the question, you're actually informing the user of what they need to do in that situation?

#### **Sebastian Tindall:**

So we almost use the surveys as a form of education in the perfect stage as well. And we just take that box and say, "Okay, everything seems to be in order." Or the stats suggest that it's in order, the performance metrics are in order. The customer sentiment is in order, we feel comfortable enough that this has been closed and we'll move on to the next 30 projects you've got in the pipeline over the next three months.

#### **Michelle Ockers:**

So those five significant per month that you talked about early on, are they hitting the same group of people all the time or the way the workforce is organized? Would they be like as an individual, working in the front line at Vitality? Would I only be, exposed to a smaller number than that five every month?

#### **Sebastian Tindall:**

Typically there's a lot of overlap, at different levels. So I'm trying to think of an example, but there's an area in our business that deals more with the partner and awards issue, resolution and customer service elements. I want to get my code for my coffee or discounted gym membership. How do I do that? But then on the other end in Bournemouth, we've got a team that deals with brokers and they have similar but less detailed questions. So suddenly you have two needs, one, a very detailed issue resolution needed, and one more of a superficial issue resolution need. So there is an overlap in the audiences, but what we've actually started to do is say, right, the biggest need is in that partner rewards area, they're going to need all of the detail, issue resolution so that we'll issue them the prepare stage and that prepares stage, we'll give them the context and how to do some of the basics.

#### **Sebastian Tindall:**

We'll then use that as the bulk of the learning for the area that's has a superficial need. So you're actually using portions of the full rollout for one area as the actual learning for the role of the other. Plus the resources are shared. So everyone has access to the same resources. So if you did get a crazy scenario calling through from a broker, well, don't worry because you already know exactly where to find that information. So we've had to get quite cute to make sure that we're not over-training people for the sake of convenience, which would be very tempting. And you certainly wouldn't always be criticized for doing that. But our

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departmental KPIs are to continually train people last, but better to equip them to do their role. So that's counterproductive to our department's KPIs if we do that.

### Michelle Ockers:

So, where I was going with that question too, was the idea, like you're obviously gathering a lot of feedback, along the way, from your frontline staff about the resources that you're providing to them around the practice scenarios and so on how well prepared they feel, it feels like it's kind of almost, if there's five significant changes a month, it must almost be, well, this is just part of doing my job is providing the feedback as I'm learning and getting ready to support this new change

### Sebastian Tindall:

Pretty much. And that's why it's the same... it can be more than that. There can be six huge changes to your role. And actually the staff here are amazing in terms of their capacity for change. And we've noticed that, and to a degree we've embraced it because we know that people will adjust very quickly. If the resources are there and I don't feel comfortable, they will use their own time to go and learn them. And that's actually born out in the metrics that we evaluate and that light touch overview just means that you're going to be able to absorb the rest of your changes as you do your job, which is far more sustainable than pouring a textbook worth of information to your brain day one, because you don't have to read too many scientific papers to know that you're going to forget the majority of that within 24 hours.

### Sebastian Tindall:

So I guess the reality is we're trying to make people almost take some ownership of their learning, but also feel like that they can be critics of the resources as well. And say that that wasn't good enough. That hasn't helped me do my job. Great. Thank you. How do we fix that result or so not turning around and saying, "The learning didn't prepare me," because that's not the relevant question, is it, could you do your job? And if the answer is yes, then, well then you were prepared, but ironically if you ask someone, if they were confident, that's completely subjective.

### Sebastian Tindall:

Some people are never confident. Some people are really confident and actually they shouldn't be, we're not going to ask you about your confidence. We're going to ask you about, can you do your job, do the metrics bear that out. If so, okay. So we've done what we needed to do.

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### Michelle Ockers:

Yeah. Yep. So along the way, at what point did you pivot to this or start working on the resource led approach?

### Sebastian Tindall:

I would say about two and a half years ago, but it took me a good six months to get my head around it and really research how that was going to factor through into our processes. It was great, we discussed it as a team first, but we knew we did a training rollout for a phone system and it was traditionally, it was exactly what you'd expect. It was waterfall and all of the feedback was good. And we all just sat there as a team and when could have done that so much better, and we could have got away with it. You could keep doing that for the couple of years, three, four years, if you wanted to. But the reality is we knew there was a better way of doing it.

### Sebastian Tindall:

The problem is there's not many textbooks you can read or places you can go to get guidance on this stuff. And I think for about 12 months, so just started hoovering through books and online articles. And I remember I bought Gloria Gary's book from eBay for eight pounds and it turned up and I was just like, okay, this is making sense to me now.

### Michelle Ockers:

What's the name of that book, sorry?

### Sebastian Tindall:

That's EPSS Electronic Performance Support Systems and obviously I think it was like 1994. It was released. And technology has changed a lot since then, but in the book, she's kind of talking about how the systems can use to influence. And actually, she's just starting to intimate a lot of the thinking around workflow learning. And there's so many people now who will speak at conferences and talk to you about workflow learning, but not actually give credit to those people who first inspired...

### Michelle Ockers:

She was ahead of her time by the sound of it.

### Sebastian Tindall:

She was definitely ahead of our time. Absolutely. Yeah, absolutely.

### Michelle Ockers:

So are there any other key resources that spring to mind or key people that you found really helpful to shape your approach?

### Sebastian Tindall:

Yeah, there's definitely been a couple. I think there's a number of people obviously outside of L&D. And I'll talk about those in a minute, but, I was always a fan of Bob Mosher and he released a book called Innovative Performance Support. I think you can get that through Amazon and in there he details a little bit more about rapid task analysis if people are interested in that. I think it's just a well-written book because it uses quite a lot of analogies. I think that's sometimes quite good to be able to convey the force of what you're trying to do to stakeholders who perhaps on ensconced in L&D every single day. So I think that's a really good book. He did a podcast with David James who is...

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### Michelle Ockers:

The Learning Development Podcast?

### Sebastian Tindall:

Yeah, that's the one and they did a really good self-effacing podcast about, they realize that the learning that they delivered wasn't great, traditionally was great, but it wasn't great. And that those guys, obviously run it before me. In fact, I took a lot of inspiration from that podcast, but it was more about that seminal moment when you just get everything about the textbooks and everything I've learned tells me that that should have been good, but I know it wasn't. So what's the answer. And they were really good to talk about.

### Sebastian Tindall:

I guess the process that I took from it was almost de-risking the learning, how can you create it so that somebody can come into a training event and you can forget everything, but you can still do your job. And that for me is what we're almost trying to do with our team members to say learning is an imperfect tool and actually it's inefficient. And if that's your only tool and your only products. Now companies like Kodak and Blockbuster will tell you, that's not a very sustainable business model. So continually my team are doing things to increase our offering outside of courses and learning because training people is amazing, but it costs money.

### Sebastian Tindall:

So if you're going to do it, you better make sure you're incredibly efficient at doing it because it's increasingly harder to demonstrate the ROI. So we're actually implementing in the next couple of months, like user experience assessment in our processes where we will take a process that someone trying to implement, and we'll sit down with end users and we've devised almost a numerical score of complexity.

### Sebastian Tindall:

And we will take that back to stakeholders and say, "Here's what your people are saying about this." And actually you've got two options. You can improve that process. And here's the key areas that are difficult, or you can go with that process and you can live with the drawbacks of complexity. And what you will see is a propensity for human error. You will see slower call handling, et cetera, et cetera. So you can kind of make that decision. We are targeting people from training last. This is going to make us have to train more and it's going to cost you X amount. So-

### Michelle Ockers:

That's a great value add just from like it almost, it builds up that goal or we want to train less and in order to train less, it means that things need to be simpler to use, more intuitive to use, be it software, be it process, and you're road testing the process for whoever's designed it in a way.

### Sebastian Tindall:

And it's incredible because what we find, we've piloted a number of times actually been really good. And we've just had sign off from the internal continuous improvement teams who were actually going to take this process from us and use it which is brilliant. But you sit in a room with people and they'll kind of ask you questions because you're going through the process. And I think we've all experienced it. The questions that people ask you during learning events sometimes are just the ones that are just almost guaranteed to stump you because no one ever thought of those.

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### Sebastian Tindall:

Well, how cool is it? If you can get those analysis stage, you can share an early view of that process and use it to inform the learning. But also if people are really worried about a part of the process that might be really manual or difficult, how amazing would it be if we just take out because end users don't want it, it costs us money. We certainly don't want it because it's a nightmare to train people and get them to understand it. And also typically speaking, that's exactly what you're going to get requests for. And I'm doing air quotes now because people can't see me refresh a training, which is another bug bear and pet peeve of mine. And I think for us-

### Michelle Ockers:

Redo that training that didn't work to prepare me for what I needed to do last time.

### Sebastian Tindall:

100%. We get to that point to see that's your ecosystem's broken at that point because it can't self-correct, it's like putting a space heater in a house when the central heating is broken, it's just not going to self-regulate. So what we're asking people to do is say, well, quantify the change and where you're going to start creating heat maps now of complexity, that's going into people's roles. And quite quickly, then you can kind of say, well, that's five highly complex things going, is that role an individual month?

### Sebastian Tindall:

We can certainly get more efficient as we are doing. We can get people to understand it, but at what point do you turn around and say, that's enough.

### Michelle Ockers:

For the change capacity aspect coming into play there as well. Yeah. I love the way you're-

### Sebastian Tindall:

yeah

### Michelle Ockers:

... integrating a lot of these things into your process, which are not things traditionally that learning and development teams would do. They might be things we kind of have to live with, and we're at the tail end of some of this, but you're moving back into the process that where I'm partnering differently with the organization to achieve an outcome that's better for all in terms of performance.

### Sebastian Tindall:

Vitality is a great organization where you can have these challenging conversations with people. And I think people will receive it in the right way because the goal is the same. How amazing would a business be if it could deliver instantaneous complex change? Well, that's what we all want, right? So let's all work together to that task. And I think Vitality is amazing at producing processes. And it's a great company for that, but at the same time, a by-product of the entrepreneurial nature is that some of these processes need to be refined. And I guess it's getting to that middle ground of what is good enough from an adoption perspective and minimizes the change fatigue for our people and increases the likelihood for success. And I think for me, that fits quite naturally in a learning development arena, but for many of the teams, I see why they might say, "Well, that's not up to us." I completely get that, but try and grow your product set because eventually if you do get to a point where you're training people less, then you're going to need to add value in a number of different ways.

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### Michelle Ockers:

Yep. They're great examples of creating value. So there were obviously a lot of things you need to figure out along the way. You would have had a shift in skillset required in your team. What were the key challenges or barriers that you needed to address to make the shift over the last two and a half years to the approach you described to us today?

### Sebastian Tindall:

I think one of the key barriers was some of the really ingrained traditional beliefs of what a learning development should do. And I think one of the main ones was e-learning should look great. That's a typical belief. I completely disagree. I think it should just work. I think if it's expensive and looking great, we'll use it again. And we were kind of having debates about kind of regulatory learning. And some businesses might spend two months creating a module that lasts for an hour and it gets rolled out once a year.

### Sebastian Tindall:

And then eight weeks for one hour's worth of output is that efficient in my mind. No, it's absolutely not. So you almost have to remove the ego and say, this is just almost the simplest e-learning course possible because it's irrelevant. It's just a package and we'll just throw it away and you'll never see it again.

### Sebastian Tindall:

So don't be afraid to tell people that's what you're doing. And it's almost kind of, that was a difficult part because a lot of people wanted it to be glossy and looking credible, but we were just saying, "Well, that's a waste, wasted time to a degree." Another one was typical conversation around classroom training, and we want classroom. We need classroom, classroom is better. And there was an amazing, white paper that was written. I'll forward it onto you so you've got a copy, but it was, it was talking about passive versus active learning and how they tested it out in higher education. And that people who took part in passive lectures, almost exposition style learning, were more than 30% more likely to fail their course at university than engage in active conversations. Now, I completely appreciate that when many people do classroom sessions, the majority of them they'll try and engineer to be active, but a lot of people aren't active in that learning experience as well.

### Sebastian Tindall:

And that's kind of what you're opening yourself up to. And there's a follow-on conclusion in there where they actually get people to rate how useful they felt each individual learning's reaction was. And by and large people felt the most useful was passive learning, but ironically, it was the least useful for them. And I think it's getting our team to understand that sometimes people don't know what's been useful for them. And actually that is a really tough realization because when you go and train with the SAS and I asked you halfway through your basic training after you've just done a 50-mile high, can I ask you, is this really useful? I don't think you're necessarily going to give the answer. This is the most enjoyable learning in the world, but they make the best soldiers in the world, right. And I guess for us, it's more about sometimes you can ask people what they want, but they're not always going to know. And actually it's our team's responsibility to be able to find out what people need. And that's far more important.

### Michelle Ockers:

Are you familiar with the story about Henry Ford and the creation of the T model? The first...

### Sebastian Tindall:

Was that any colour?

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### Michelle Ockers:

It's along the lines of, I'm paraphrasing here... If I'd asked people what they wanted, they would've said a faster horse, because they don't know what they don't know, right. And it's interesting. I've been digging into Will Thalheimer's work on evaluation a lot recently. And one of the things he says is, "When we're evaluating we need to help people make better decisions." Because when they're replying on an evaluation, they're making a decision about the experience they've had or what they've learned. And he said, sometimes they're not the best-informed people to decide whether they've actually learned something or whether the experience that they've had was an effective learning experience. And I guess that's kind of what you were saying as well here. There's a similar theme to it.

### Sebastian Tindall:

It is. And I think I would just encourage people just to do their own research on some of these things. And maybe you just choose one accepted belief and really challenge it and go out there and get some resources and some white papers about it, because you might just find out that the conclusion that that has been passed to you is probably not 100% accurate all of the time.

### Michelle Ockers:

Yeah. I want to say productive myth-busting, isn't it, or they'll bring being evidence just picking one thing and digging into it. That would be a great thing to do, like with a learning team. Now, maybe each month, it's like, what are we going to dig into? Let's start with an easy one. Let's start with learning styles and see what the truth is about learning styles. And then another one I'm just going pause there I'm not going to go into that, because it's for people to get to that one on their own, on the internet.

### Sebastian Tindall:

But what a great example and learning styles are still in many curriculums, so follow L&D qualifications. I love this profession and I think it's important to have the credibility of qualifications absolutely. But you must challenge what you hear in those as well. And I don't think I've been to learning about when someone hasn't talked about 70-20-10, but nobody's read the research behind there. And I think the message is convenient. The message you must own 90% of your learning, but the research is based on the experience of 250 executives.

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### Sebastian Tindall:

Now, is that going to apply to every single learning environment across the business? Possibly not. And I guess the argument that we've made with our team is if you're only focusing on 10% of people's development, that's not business performance, 90% is the workflow. So focus your attention on that 90% and don't concentrate on 10% of what you're trying to catalyze, because imagine an external consultant came in here now and said, "What do you focus your time on?" Well, 10% of the thing, no matter how. Okay. Well, you seem expendable to me. And I think that for me is something we've just constantly [inaudible 00:55:52] and said, we think this is true, but let's go and find out.

### Michelle Ockers:

Yeah. And it's interesting because we did talk about two examples, learning styles and 70-20-10. Now, if you dig into the evidence they're often misunderstood misinterpreted, but it doesn't mean they don't have some useful point to them. Right?

### Sebastian Tindall:

Exactly.

### Michelle Ockers:

There's that distinction as well, but know your stuff because knowing your staff gives you confidence and courage to do things better, right. To try new things, or to be able to speak with your stakeholders about why things work or why you'd like to stretch them, to entertain a different approach as well,

### Sebastian Tindall:

100%. And I guess it's just, if you're going to use a model or you're going to use something within your theme, just make sure that you agree with the conclusion that 70-20-10 is brilliant because it sends a very good message to stakeholders. But if you're going to use that model and put your name behind it, just do the research and it might verify or might confirm what you know, and actually it might give you extra things to produce when people ask you questions about it, but at the same time, don't just accept it to be true, go and research and you will be interested in terms of what you find.

### Michelle Ockers:

Absolutely. So, Seb what tips do you have? If people are listening, and I think anyone who's been listening so far has probably got a whole if there'd be no taking, they have a whole page full of notes without a doubt. But if you want it to sort of summarize down to just two or three key tips, if anyone wants to get started with more of a performance support or resource-led approach, what would you advise them to do to start?

### Sebastian Tindall:

I think the first things first is if anyone figures out an amazing way of doing it, as well is to let me know. We're still figuring this stuff out. And I think we'll still be figuring out for a number of years as the kind of technological landscape changes. We've certainly made loads of mistakes and actually that they're the biggest learning experiences for us. But I think the number one thing would be when you sit down and someone gives you a project, or you identify a need, I guess you'd want to ask yourself the question. Imagine we couldn't provide any training. What could we give people to make sure that they could still do the task? And you can start with just that question. And I think you can do rapid task and I'll assess whatever you got the time or the appetite to do something like that.

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#### Sebastian Tindall:

You can do any of the ID models. You can do digital, you don't have to do digital, but I just think if you start with that question, you're going to de-risk your learning. And you're going to say, "Well, don't worry, because if they do forget all of it, here's the thing is they're going to be available to make sure you get it right." Immediately you're starting that shift and it's not going to cost you a lot of money. It's not going to take an incredible amount of selling to stakeholders to be able to do that. It's just a simple question that you can include in your analysis process. And I think that for us started to pull it the string and unravel some of our thinking and some of the roll outs that we'd done previously.

#### Michelle Ockers:

That's a great place to start.

#### Sebastian Tindall:

What about yourself? I mean, obviously you've had some experience in it Michelle, what would you provide advice on?

#### Michelle Ockers:

I think the whole idea of trying an experiment, and also I think there's something about adaptability. Like when you're looking at something and you're always going to have to create some sort of resource, how can I create something that's as versatile as possible? Something that will be able to be used in different contexts and what might those contexts be and where do I put it? Don't put things here and in our learning management system, if they don't need to be there. Where do people go to get stuff? You don't see a toy store putting the toys in the warehouse right. They're, right on the shelf. But I level for the kids make it easy, make it really easy for people to get to things in their moment of need. And you mentioned, Bob Mosher before I love Mosher principles 5 Moments of learning Need. I think that's such a useful way of thinking about how and when are people going to need support to do a job better?

#### Sebastian Tindall:

Yeah. He's so good. I think the way he talks about this stuff. Bob is so relatable. And I think it's really funny because when you look back and you look at some of the origins of performance support, you'll notice you remember, you used to log on to Excel and that little paper clip used to pop up and go, "Hey, it looks like you're trying to do this. Do you want some help with it?" And I think we've always used that example to people to say the start of it to a degree because no, one's going to go and read a 50-page book on how to do a spreadsheet.

#### Sebastian Tindall:

You stay on an Excel spreadsheet, you figure out you can't do it, you scream at it. And then you try and find someone to help you. That stuff is built in and that is a great example of the beginnings of EPSS and performance support, because there's some stuff that you just gonna want to try and figure out yourself, and that's better for people. So how can you create a paperclip that's slightly less annoying.

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### Michelle Ockers:

We might leave it there. Thank you so much, Sebastian, for sharing your work and insights with us today.

### Sebastian Tindall:

Pleasure.

### Michelle Ockers:

It's been a treasure trove. There's lots of good stuff to pull out there for everybody. And we'll include a link to your LinkedIn profile. If anyone would like to get in touch with you and find out more about topics we've discussed and there's a stack of stuff that we'll be putting in the show notes. So thank you so much for being with us today.

### Sebastian Tindall:

Pleasure. Thanks for having me.



### **ReThink Learning – A Message from Michelle Ockers**

*I created Rethink Learning to help learning teams and learning professionals with this challenge. The barriers to learning innovation are lower than ever. Now is the time to engage business stakeholders, embed good design practices, work in agile ways and use technology more effectively.*

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### **About Michelle Ockers**

*Michelle Ockers works with business and learning leaders to realise the untapped potential of learning in organisations. She is an organisational learning strategist and modern workplace learning practitioner. Michelle works with organisations to develop and implement transformative*

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### **Sebastian Tindall – Resource-led learning strategy**

*organisational learning strategy, and to build the capability of their learning team. She delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events. Michelle also mentors learning professionals at all career stages on career planning and professional development.*

*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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