The Power of the 5 Moments of Need:
Enabling Performance in the Flow of Work

"Learning at the moment of need is revolutionizing our industry. Learn how to use a Digital Coach to ensure highly successful workflow learning implementations."

Presented by
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APPLY · CHANGE · SOLVE · NEW · MORE
THE 5 MOMENTS OF NEED

What are the greatest challenges Trainers <u>and</u> Learners face during, and AFTER, instruction?
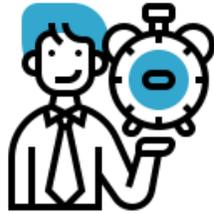
Overwhelmed

Covering "everything"

Applying what they learned

Remaining current!!!!!

These are, and HAVE been, the "elephants" in the room...

What the Research Supports:

The time training new hires to perform effectively in their jobs, takes, on the average, **twice as long** as necessary.

Employees waste work time attempting to remember how to do their work and/or resolve challenges – **up to 8 hours per week**.

Generally, **half of the time required to train** replacements due to turnover, is unnecessary.
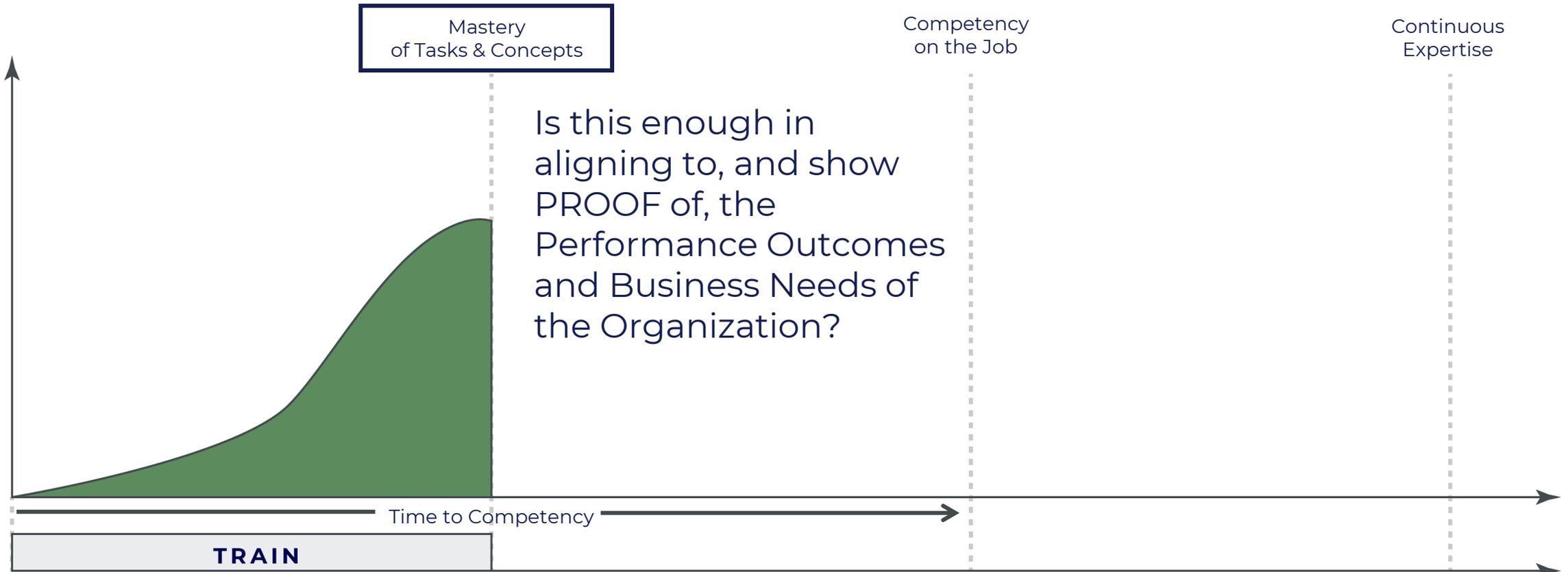
The "I'd like 5 Days of Training on…" Problem

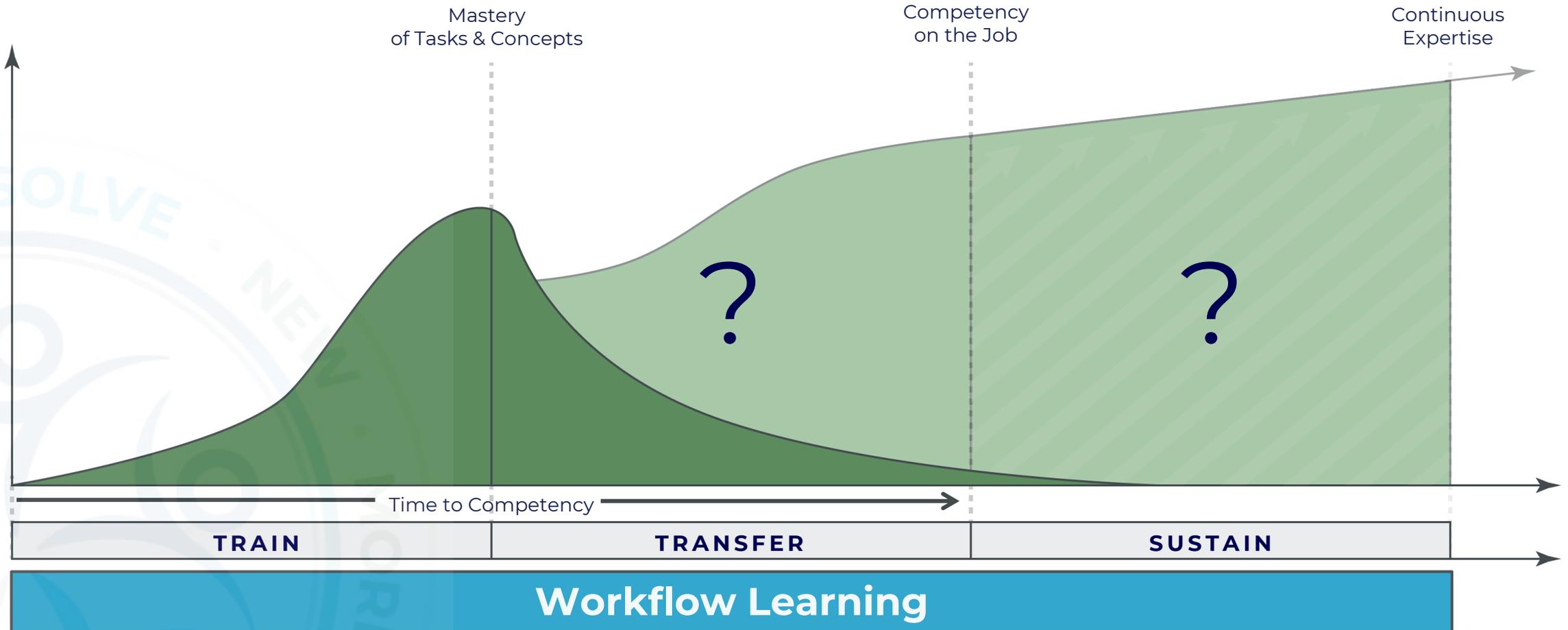| Instructional Treatment	5 Day Course: Traditional Training Design Approach
	1000 + slides 33 slides per hour (1.8 minute per slide)
Present Content	80%
Discuss	10%
Showing How	05%
Practice with Feedback	05%
Review	0%

This is what happens when every performance issue is a "Training Problem"

Where a "Training-First" Design approach breaks down

Mastery
of Tasks & Concepts

Competency
on the Job

Continuous
Expertise

Is this enough in aligning to, and show PROOF of, the Performance Outcomes and Business Needs of the Organization?

Time to Competency

TRAIN

Where a "Training-First" Design approach breaks down

Mastery
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Competency
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Continuous
Expertise

?

?

Time to Competency

TRAIN

TRANSFER

SUSTAIN

Workflow Learning

Design for The 5 Moments of Need

Formal Instruction - ILT, VILT, e-Learning...

MORE

Workflow Learning - Digital Coach

CHANGE

APPLY

NEW

SOLVE

Build for **APPLY** first

Designing for Performance-First based on a Workflow Learning Framework!
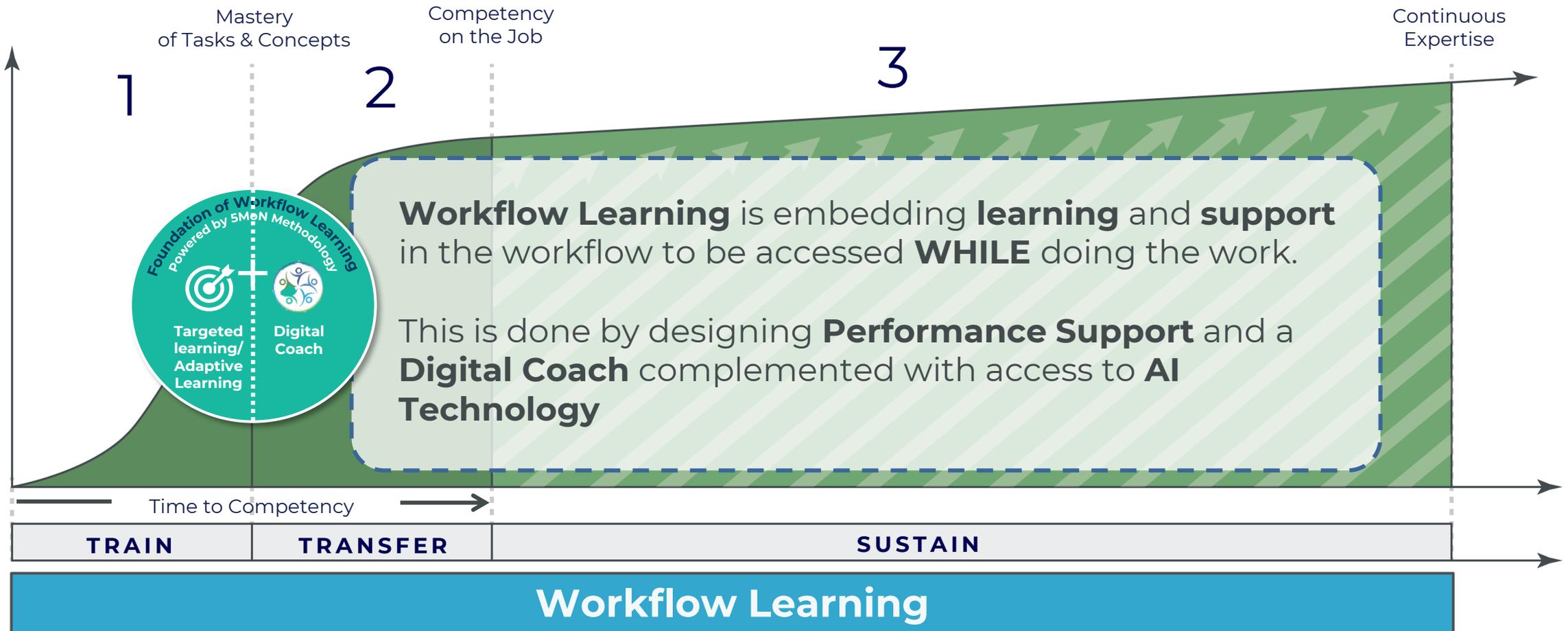
Mastery
of Tasks & Concepts

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Continuous
Expertise

1

2

3

Foundation of Workflow Learning
Powered by 5MoN Methodology

Targeted learning/ Adaptive Learning

+

Digital Coach

Workflow Learning is embedding **learning** and **support** in the workflow to be accessed **WHILE** doing the work.

This is done by designing **Performance Support** and a **Digital Coach** complemented with access to **AI Technology**

Time to Competency

TRAIN **TRANSFER** **SUSTAIN**

Workflow Learning

A Definition for a New Deliverable – Digital Coach

"An orchestrated set of electronic services that provide on-demand access to integrated information, guidance, advice, assistance, training, and tools to enable high-level job performance with minimum of support from other people."

GLORIA GERY

Electronic Performance Support Systems, ***1991***

What words in this definition are the most meaningful to you?

A Definition for a New Deliverable – Digital Coach

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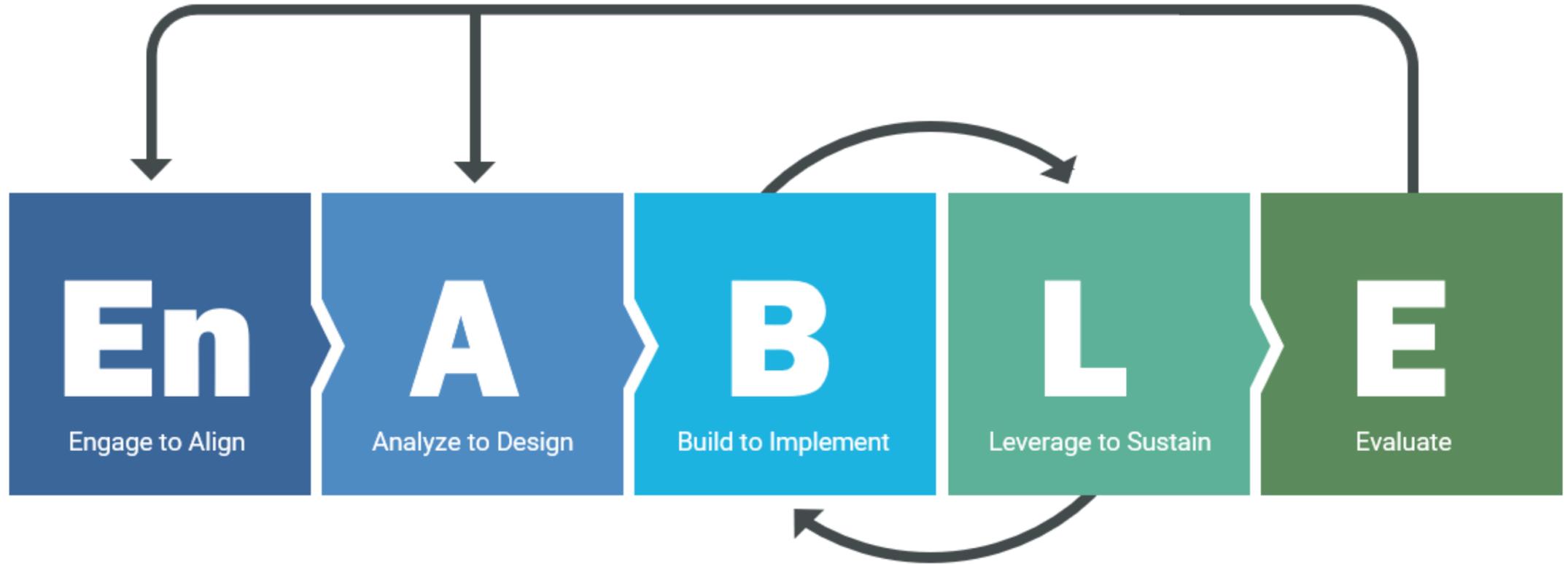
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EnABLE Design Methodology

EnABLE Design Methodology

RAPID WORKFLOW ANALYSIS

map in a structured way all the tasks and roles of the employees within a certain setting

CRITICAL SKILLS ANALYSIS

rate the level of critically, the real impact of failure of the tasks and concepts

LEARNING EXPERIENCE & PERFORMANCE PLAN

create the ultimate full instructional blue-print of the complete learning and performance solution

Develop and implement the learning and performance solution

EnABLE Design Methodology

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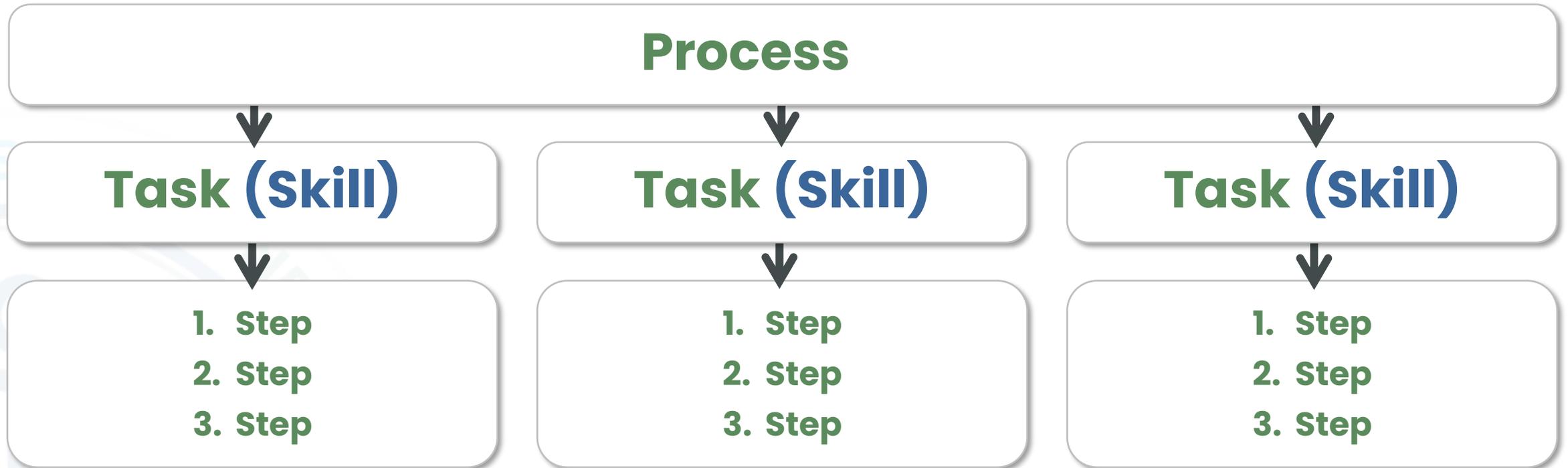rate the level of critically, the real impact of failure of the tasks and concepts

LEARNING EXPERIENCE & PERFORMANCE PLAN

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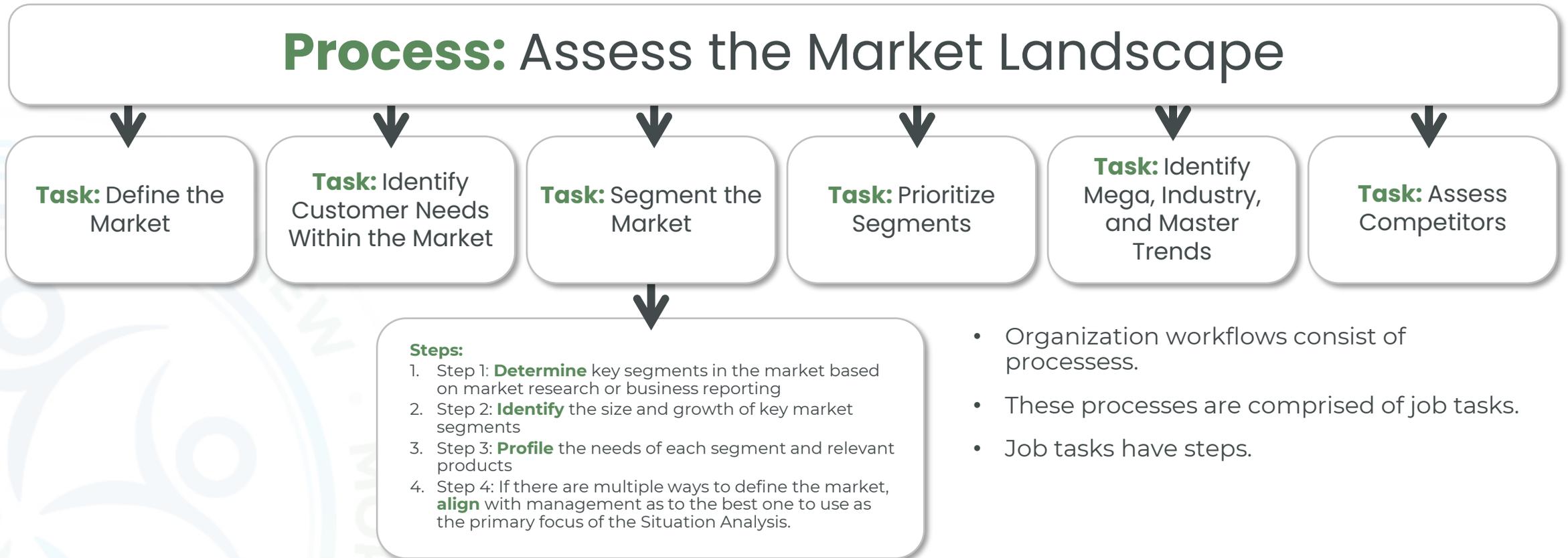Develop and implement the learning and performance solution

The Workflow Map

Process

Task (Skill) | **Task (Skill)** | **Task (Skill)**

1. Step	1. Step	1. Step
2. Step	2. Step	2. Step
3. Step	3. Step	3. Step

PROCESS: A collection of tasks that results in the completion of a **broad** performance outcome.
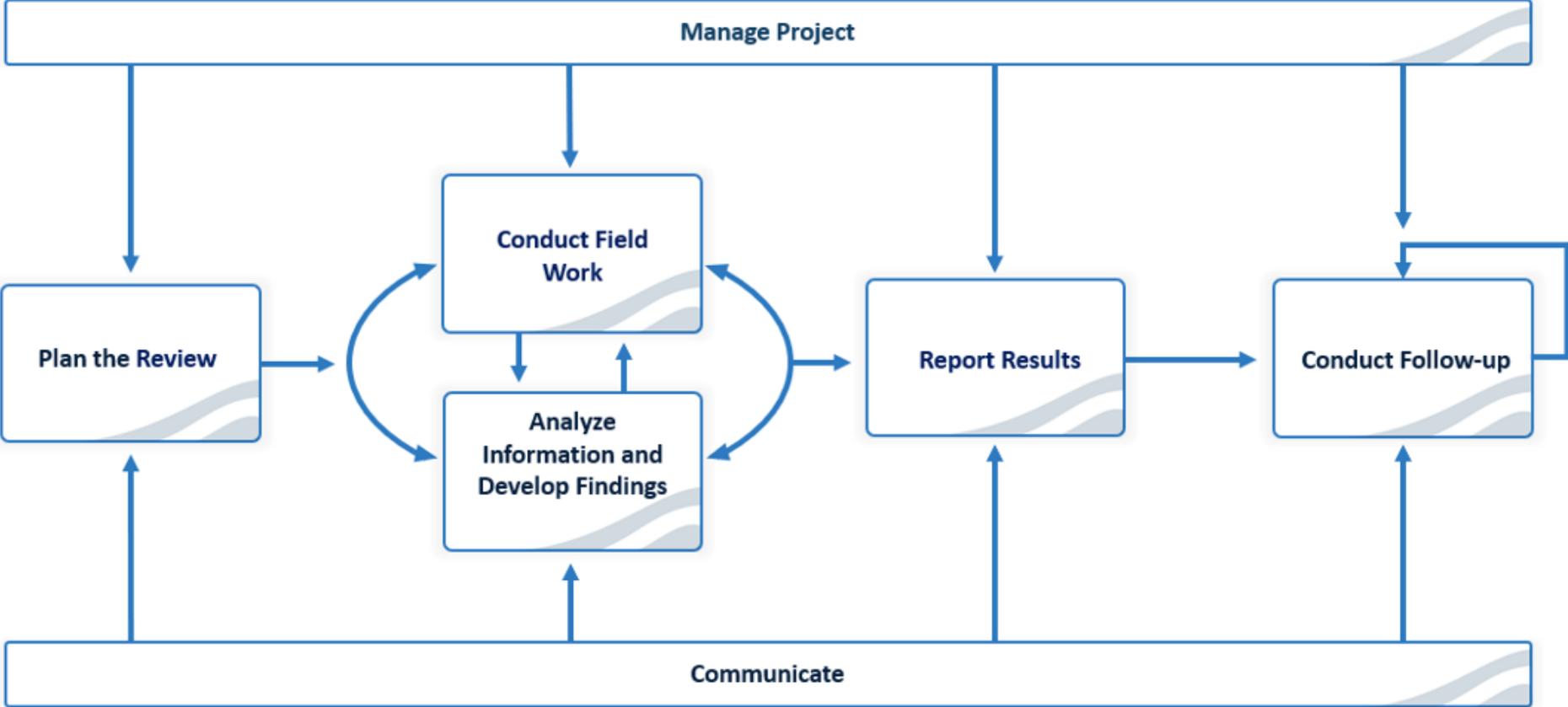
TASK: A collection of steps or guidelines that results in the completion of a **specific** performance outcome.

STEP: A discrete action or guideline within a task that does **not** stand alone but is performed as part of a task.

The Workflow Map

Process: Assess the Market Landscape

Task: Define the Market

Task: Identify Customer Needs Within the Market

Task: Segment the Market

Task: Prioritize Segments

Task: Identify Mega, Industry, and Master Trends

Task: Assess Competitors

Steps:
1. Step 1: **Determine** key segments in the market based on market research or business reporting
2. Step 2: **Identify** the size and growth of key market segments
3. Step 3: **Profile** the needs of each segment and relevant products
4. Step 4: If there are multiple ways to define the market, **align** with management as to the best one to use as the primary focus of the Situation Analysis.

- Organization workflows consist of processess.
- These processes are comprised of job tasks.
- Job tasks have steps.

The Workflow Map

EnABLE Design Methodology

RAPID WORKFLOW ANALYSIS

map in a structured way all the tasks and roles of the employees within a certain setting

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LEARNING EXPERIENCE & PERFORMANCE PLAN

create the ultimate full instructional blue-print of the complete learning and performance solution

Develop and implement the learning and performance solution

How do we blend formal with workflow learning?

Minimal Impact

Decreased but recoverable efficiencies in performing the work.

- The consequences, impact and outcomes are negligible.
- There could be some initial decrease in workflow efficiencies and/or increase in workload, but the consequence does not last for a long time.

Moderate Impact

Limited (but noticeable) impact on the success of the situation.

- The event may impact the attitude and workload of yourself and others.
- If there is a reputation or monetary loss, it would have moderate or temporary harm, damage or loss to the organization.

Significant Impact

Requires sizable commitment to repair or has lasting consequences.

- Significant client or colleague harm would occur with potentially permane[nt] conseque[nces]
- Work env[...] and/or c[...] adversely [...]
- Relations[...] employee[...] clients w[...] compro[...]

Catastrophic Impact

Create a major problem for employees, clients or the organization.

- Irreparable/permanent damage and loss or harm to the organization and its [...]uld occur. [...]tatus of [...] and its [...] is mission [...]mpromised. [...]amage to [...]between [...]nd clients

Digital Coach

Targeted Training AND **Digital Coach**

AI changes EVERYTHING!!!

Including our Role and what we're allowed, or able, to do...
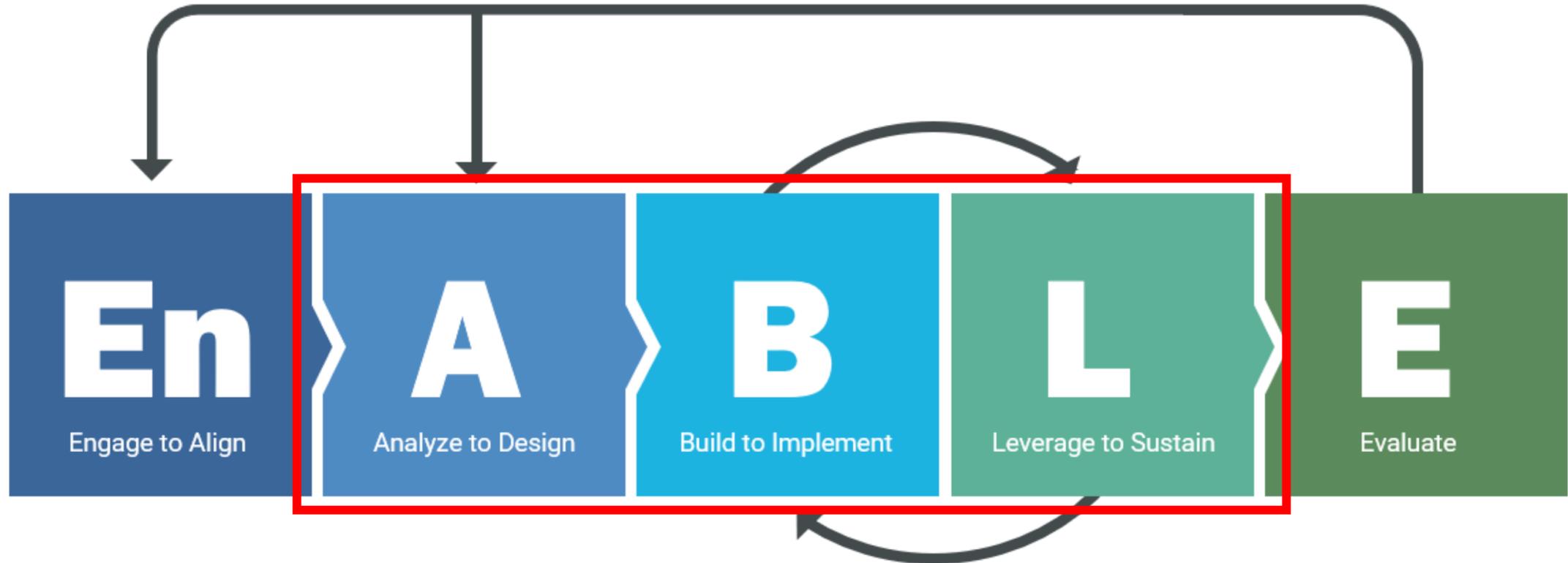
Building Workflow Learning/ 5 Moments of Need Deliverables:
1. Rapid Workflow Analysis – Process Mapping, Tasks, Supporting Knowledge
2. Critical Impact of Failure Analysis
3. Complexity Analysis
4. Governance Strategy

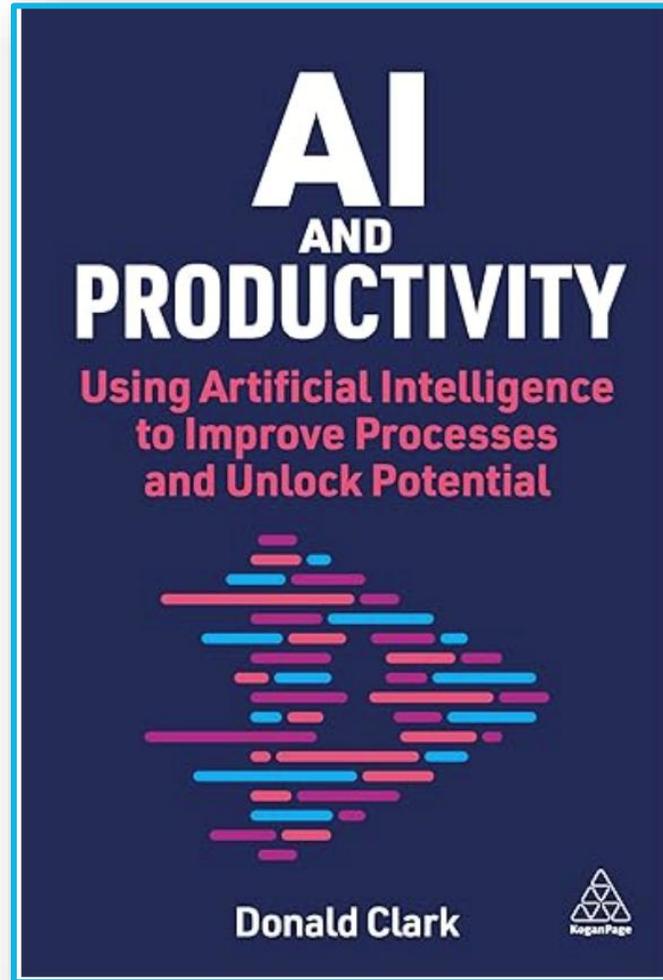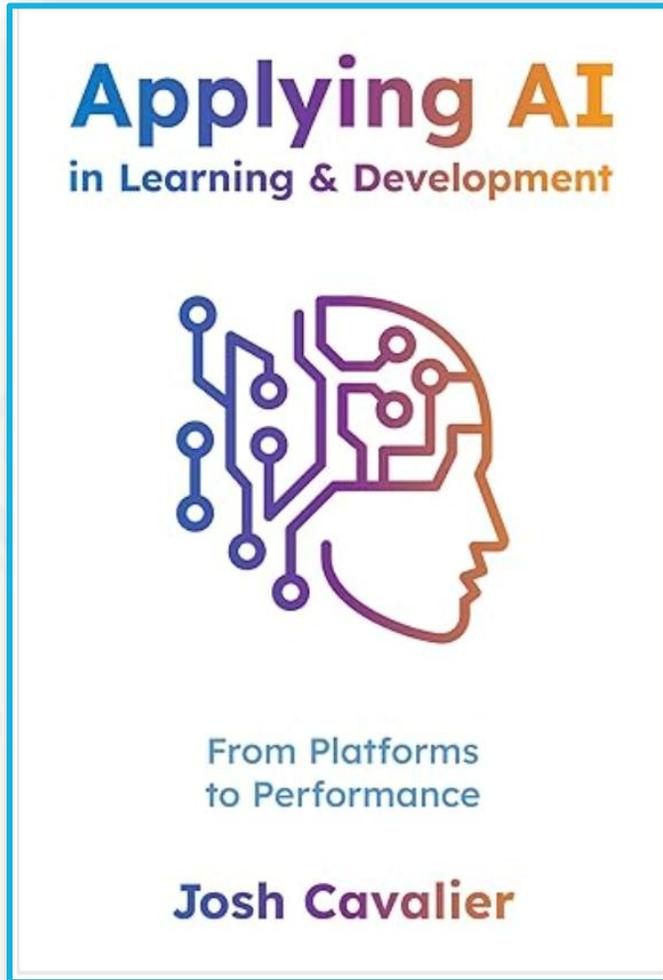# We can FINALLY Align to Business Needs & Evaluate ROI!
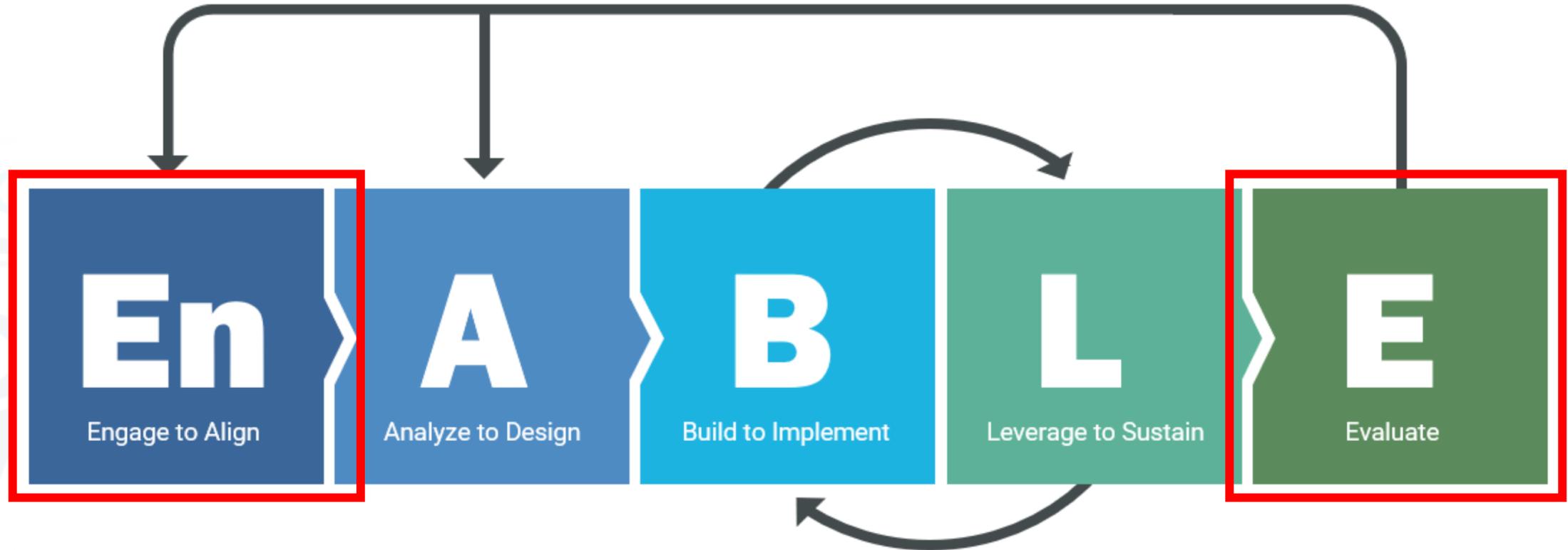
Engage to Align:
1. Determine Business Impact Requirements
2. Identify Initiatives and Potential Solutions
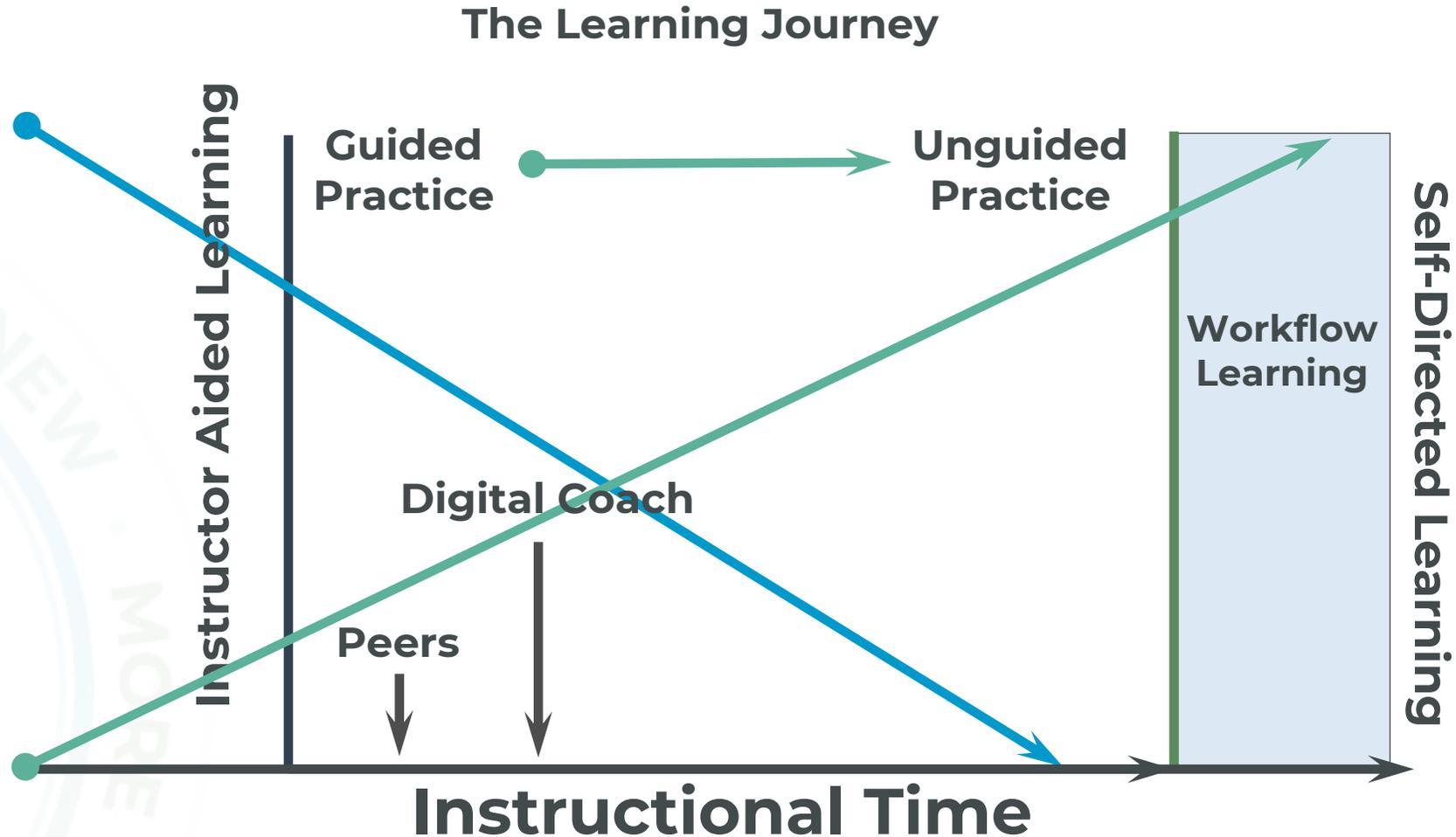3. Scope Learning & Performance Solutions

Evaluate for Impact:
1. Develop a Data Plan
2. Gather Data
3. Analyze and Report

MUST read...

Applying AI in Learning & Development — From Platforms to Performance — Josh Cavalier

AI AND PRODUCTIVITY — Using Artificial Intelligence to Improve Processes and Unlock Potential — Donald Clark — KoganPage

Targeted Training: Learn to Learn

Train to independence using the Digital Coach in the training

The Learning Journey

Instructor Aided Learning

Guided Practice → Unguided Practice

Workflow Learning

Self-Directed Learning

Digital Coach

Peers

Instructional Time

AFTER an Implementing a 5 Moments of Need Solution:
A TRUE Blended Learning Success Story

Instructional Treatment	5 Day Course: Traditional Training Design Approach	2 Day Course: Performance-centered Approach
	1000 + slides 33 slides per hour (1.8 minute per slide)	75 slides 5 slides per hour (12 minutes per slide)
Present Content	80%	10%
Discuss	10%	20%
Showing How	05%	15%
Practice with Feedback	05%	45%
Review	0%	10%

Tracking Business Impact, not completion or "passing"

Organization:	Impact on Training:	Time to Competency:	Productivity Impact:	Thru put:
International Management Consulting Firm	Training Effort reduced from **2 weeks to 2 hours**	Reduced from **18 months** to 5 Months in 2 years and to **3 months** in the following year	Reduced Coaching load from a **1:7 Ration to a 1:3** due to the learner's ability to stand self-reliant	Accelerated skills for 230 employees **increasing their overall capacity by 25~30%**
US Government Agency	Training Effort reduced by **50%**	Auditors were able to be productive/engaged **on their first day on the job** using their Digital Coach. **In the past this had taken weeks if not months, depending on the department.**	Were able to **standardize** on an agreed upon auditing process **across 75 departments** by using their Digital Coach to help teach, support and oversee the process	Went from only serving a **fraction** of their workforce through the old residential model to **reaching their entire user population**.
Multinational Insurance Agency	Their digital coach was able to be used in one of their "onboarding" programs to help employees better understand their career progression.	It **became the go to** approach for performing effectively, so much that it was **one of the first tool an employee looked for when changing roles**!	Their digital coach has become the **foundation** of how they *change business processes and implement change* management across the business. **It's not viewed as just a "tool". It's integral to them doing their work.**	The digital coach has become a **single-source of truth for all institutional knowledge** that used to be scattered across the enterprise.
International Manufacturing Company	New Hire Training Reduced by **33%** - reduced from **1.5 months to 1 month**	Allowed Line workers to **move across manufacturing lines** with a minimum amount of training	• Met or exceeded all operational goals • Operating efficiency increased by 3% over baseline • Asset Utilization increased by 4% over baseline • Unplanned Downtime decreased by 3% over baseline • Product Changeover improved by 20% in 12 months	**100% of users wanted Digital Coaches installed on every line** and increased the use of their DC to 52 plants across the globe

Questions???

Thank you! - bob@applysynergies.com

Workflow Learning Day 2026