



Lies About Learners

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President Harry S. Truman once said he wanted an economist who was one-handed. Why? Because his economic advisors would typically give him economic advice stating, “On the one hand...and on the other...” (Thredgold, 2001).

It may seem like a bit of a jump to go from practicing economists to learners, but like everyone, every economist had to start somewhere. Anyone who has read economics will surely chuckle in recognition and appreciation at the anecdote, but the position itself isn't as unlikely as the joke makes it sound—a lot of jokes work that way. The world is a complex place, especially when you throw primates with opposable thumbs into the mix.

Although the search for a silver-bullet solution is understandable, the longer you work in the field, the more you realize the quest is bogus because there aren't any silver bullets, just hard work and careful thought. When you find what looks like single causation in human affairs you should be suspicious because it's probably a scam of some kind—maybe not as egregiously venal as an Enron, but there's likely to be something missing in the argument. This is certainly true in learning. Multiplying metaphors now, think about the little angel that perches on one shoulder and the little devil on the other, each

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whispering a seductive story in your ear. Isn't it interesting that the attribution as to which one controls all the details is given to both the divine and the diabolic (Hirsch, Kett, & Trefil, 2002)?

So, bear with me. In the spirit of rigorous inquiry, I'm going to play *advocatus diaboli* (devil's advocate), noting that in formal Catholic usage the role is also called—perhaps more trenchantly for this purpose—*Promotor Fidei*, meaning serving as guardian of the integrity of the process and promoter of the faith (*Catholic Encyclopedia*, 1907). This could go on for a very long time, so, for simplicity's sake, I've boiled the discussion down to four questions that seem particularly important:

- *Awareness*: How does the learner's sense of need influence learning?
- *Motivation*: What part do internal and external incentives play in learning?
- *Personalization*: How specific do learning professionals need to be to have a measurable effect?
- *Theory*: Should learning professionals worry about cognitive theories when building learning activities?

OK, here's my full disclosure, the fine print: Just because I started with a chirality shtick doesn't imply a right-left or red-blue valence. There has to be some respite from that conversation. No matter how my arguments sound, the basis is not politics, Sonny, just business. Oh, by the way, chirality is just a high-falutin' way of saying right-handed or left-handed. Feel free to drop it into conversations to impress people.

Awareness: Learners Don't Know What They Don't Know On One Hand—Learners Need the Guidance of a Top-Down Learning Organization.

Learners don't know what they don't know. That's why companies have training groups. The orderly development of an organization's skill base requires planning, coordination, and judgment. Skills need to be

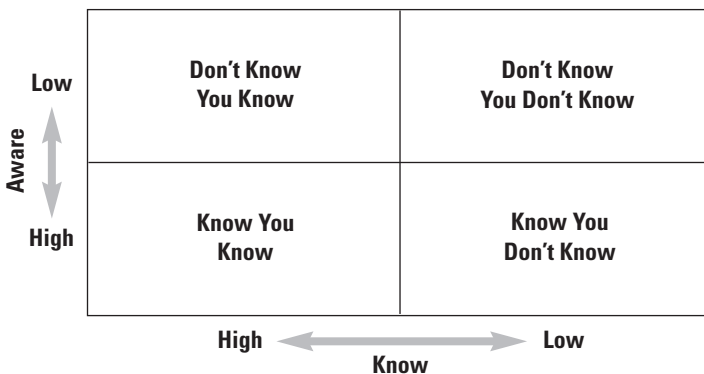
coordinated with strategy, and strategy has to respond to changes in the larger business environment. Individuals can't reasonably be expected to know the larger picture. Ignoring this difference in perspective is a quick way to handicap the organization's ability to adjust to change in a coordinated manner.

Organizations aren't ant colonies, driven by instinctual imperatives. Organizations are made up of individuals who need support and guidance if they are to work in harmony for a greater good.

Removing or downgrading the central planning and support function would do a great disservice to every individual. People have enough to do keeping up with the current demands of their jobs. It's unfair—and dangerously stupid—to expect them to devote additional energy to thinking through and preparing for what's coming next. And, then if they get it wrong what happens? Does the victim get blamed?

People who've studied what's called knowledge management make a distinction between explicit knowledge, the possession of which is consciously apparent, and tacit knowledge, which is put to use but not consciously apparent to the individual employing it (Atherton, 2005). Management consultants and learning theorists have recast this distinction into a four-quadrant diagram, sometimes called the "don't know what you don't know" schema (figure 2-1).

Figure 2-1. Don't know what you don't know.



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Expecting learners to autodidact is to ask them to come into possession of the upper right quadrant on their own, as if by magic. A bit of a stretch, don't you think, to assume that?

On the Other Hand—Learners Already Know What They Need to Know; We Training Professionals Just Have to Get Out of Their Way.

In today's rapidly evolving business environment, it's unreasonable—and probably foolish, if not dangerous—to leave staff development to some top-down process. It's important for training professionals to realize there's just too little time to let information about critical learning needs percolate down from corporate strategy, to group tactics, to individual skill needs on a case-by-case basis. It's better to publicize the overall strategy and then let smart people get on with it. After all, people are usually smarter than they're given credit for when they are treated like adults.

Besides, in today's flatter organizations the individual is much closer to the real problems than he or she ever used to be. The bureaucracy, driven by multiple constituencies and slow to react, is farther away from the issue. A modern business functions more like a federation of ever-shifting project teams. Groups that assemble for the duration of a specific project pick up skills they need on the fly and accomplish that task quite independently. The group then dissolves in preparation for the next project. In this flux-driven world, there's no way that a central learning organization can keep up. It's better to see the social contract governing that central function's role as one of providing resources, support, and incentives for self-directed learning (Christensen, 2005).

In this view, the learning organization can better spend its time:

- interpreting and communicating the development implications of current strategy
- developing a pool of resources suited to that direction
- creating access mechanisms, incentives, and infrastructure that help people find and use those resources
- guiding and tuning the ongoing process of self-development through individual initiatives.

Now, that's real value in modern business!

Motivation: Why Should They Care?

Argument From the Right Side—

People Don't Care About Learning, Just Results.

Although it sounds a bit cynical, the truth is that most people don't really care about learning, just results. People do what they're rewarded for doing. In a corporate setting, the word "results" usually means performance review or compensation. Is this a surprise? Is there anything wrong if such is the case? The important issues are to first clarify the linkage between learning and reward, and then make the experience itself something more attractive than dental work.

Really, why is the organization sponsoring the learning effort in the first place? It's not being done for some generalized social good. It's being done to advance the organization's self-interest. That's a simple, important fact.

When there's a disconnect, it lies in the lack of a consistent management approach. First, a well-communicated and explicit linkage from strategy, through tactics, down to the individual's development program is critical. If you don't know, you can't act. Equally important, the second part of the solution is to have incentives that work in harmony with that communication. When incentives are in place and implemented in a straightforward manner, the majority of people are more than prepared to take part.

The real problem comes when people's needs are underserved because management and the learning function fail to respond to an obvious need or, paradoxically, if their needs are overserved, as is happening with the torrent of compliance training slathered on top of what is often an already full calendar.

Argument From the Left Side—Learners Take It on Trust That a Learning Event Will Be a Valuable Experience.

Forget the "humans are learning machines" bit. Everybody knows that. (File this datum away under "Wisdom, Received.") More important, the past 15 years or so have taught most people that they have a vested career interest in learning and development. Learning professionals must make effective resources available in a way that learners can make the right choices about investing time and energy in the effort. Learning

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theories of various kinds say that unless barriers exist, people will learn. In fact, try to find a theory that argues that people don't want to learn.

If there's a problem, it's that the learning profession has too often

- ▶ been seduced by process rather than results
- ▶ failed to learn how to talk about the value of learning in terms that business leaders can properly value and integrate with strategy
- ▶ represented the learning function inadequately when incentive systems are put in place
- ▶ done a poor job of rising to the opportunity and trusting the learner to be a full partner in the development process.

Personalization: Who Are the Learners?

Point—Learners Are Essentially the Same.

Well, of course, they are. Time for the Homer Simpson "Doh!" award. The real question is: Does it matter? After all, people are all equipped with pretty much the same sensory equipment. Of course, some people have disabilities such as reduced hearing or vision problems or dyslexia, for example. Or, maybe English is not a learner's primary language, but there are delineated, often mandated, strategies for managing all these issues of accessibility.

All the talk about learning styles ratchets up the complexity, and there's no stopping point. Money, time, and energy are limited; there's just no point in obsessing over something like the difference between auditory and visual processing. Let's just get on with it!

Although advances in capability and reduction in cost have narrowed the differences in online delivery, the heterogeneity of platforms forces training professionals to focus on some reasonable lowest common denominator (LCD) implementations. Text and some reasonable level of graphics and animation are safe, everything else is a nice-to-have, not a must-have. Besides, the more learning professionals focus on multiple learning styles, the longer and more expensive development becomes, the higher the maintenance costs rise, and the difficulty in delivering the right learning activity to the right person increases. Besides, how many learning styles can learning professionals accommodate?

Focusing on first principles, it would be better to search for commonalities rather than differences. Though not always articulated, one of the tasks of a learning organization is to create a common culture in the organization. So is this accomplished by focusing, even implicitly, on things that set people apart? Or, would it be better to discharge responsibilities by identifying and supporting the things that people have in common and can bind them together?

In an ideal world, of course, each person would be treated as a unit of one, across any dimension you can define. Our world, however, is by no means ideal. The messy reality inhabited by learning professionals—especially in business—doesn't give them that luxury. Instead, learning professionals need to focus on identifying messages and tasks that make a crucial difference to the organization.

Counterpoint—Every Learner Is a Unique Individual.

Business drivers keep getting more complex and sophisticated, placing greater demands on both the program and the learner. Learning styles do make a significant difference in the results obtained, but it's necessary to start taking account of other important personal factors. What do individuals already know? What incentives are they reacting to? What's their work environment like? These factors have as much or more to do with the results as learning styles do. If the concern is about efficiency, treating everyone the same means aiming at the LCD. This, in turn, has two implications:

- ▶ A great deal of time is spent giving people things they already know.
- ▶ The dumbing down associated with an LCD effort means the opportunity to cultivate the better performers to their maximum potential is missed.

Perhaps a better way to spend one's time and energy is to think more carefully about what learners know and how their existing knowledge and skills can be usefully augmented, rather than worrying what modality should be used to reach them. As a wise man once said to me, "The most effective training you can deliver is the training you don't deliver." That truly is better, faster delivery.

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Let's go back to the management consultant's four-quadrant diagram, but don't look at it from the "don't know what you don't know" perspective. Instead, use a lens of what the learner really needs to know given the reality of today's world. The axes transform from a knowledge/awareness orientation to one of time sensitivity/need to know, as shown in figure 2-2. This orientation helps shift attention from the general to the specific and closes the loop from theory to personalization.

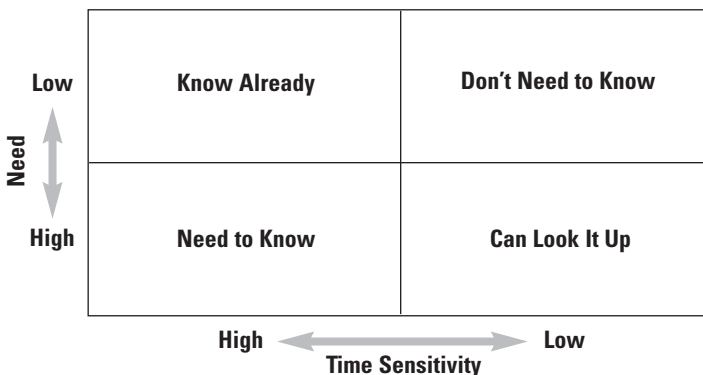
Most important, designers begin to think about that oh-so-critical upper half of the diagram, which represents a pile of money in the center of the table doused with lighter fluid and set ablaze. Going back to the wise man mentioned previously, he'd also stress that "The cheapest training you can deliver is the training you don't deliver." And, it's risk-free to boot. When I worked in the printing business, the mantra was "Better, faster, cheaper. Pick any two." Of course, to identify that magic quadrant, learning professionals must treat each learner as an individual—at a minimum, as a definable segment—and then design accordingly.

Theory: How Do We Reach Them?

Heads, You Win—Younger Learners Are Inherently Different From Older Ones.

Are they? The hot trends in learning circles would have you believe so. On the one hand, this issue is really part of the larger discussion

Figure 2-2. What the learner really needs to know given the reality of today's world.



regarding learning personalization. On the other hand (there I go again!), enough people seem to think that the differences that revolve around age are substantial enough to warrant taking on the Millennial Learner issue all by itself.

There's an interesting paradox in the learning business. The majority of people doing research in academia and management in adult training settings are at least a generation older than the people about which they're busy making generalizations. They didn't grow up in the same and probably radically different world that a 20-year-old has—a world of instantaneous communication, flat hierarchy, saturation marketing, multiple gratifications, distrust of authority, and media convergence.

Both research and anecdotal evidence indicate that, to a degree unmatched by earlier age cohorts, the younger generations of learners are characterized by a demand for the following:

- relevant development activities
- rich experiences
- flexibility in scheduling
- community as a primary component
- technology emphasis and familiarity
- instant results and constant feedback.

It would be the height of folly—to say nothing of patronizing arrogance—to say that these differences are without effect or affect. The actual import of these differences is arguable because the jury is still out. But, to argue that the effects can be ignored because there are more pressing things to worry about is foolish and ultimately self-defeating.

The demographic hole is becoming deeper in corporate training organizations. The greybeards in senior positions show little inclination to leave. (After all, what does retirement mean to an increasingly older workforce?) Meanwhile, the learner audience is bifurcating into older and younger groups with the middle group regularly thinned out by reductions in force, downsizing, acquisitions, outsourcing, and flat job creation. This phenomenon just drives a greater wedge of incomprehension into the landscape.

Or, as Frank Zappa sang in 1966, “There’s no way to delay that trouble comin’ every day.”

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Tails, You Win Again—Age Doesn't Matter.

Worrying about the age of learners is another way that some designers waste time. The research around GenX/Y/Z or whatever label you stick on them (keeping in mind that nobody asks them how they would identify themselves) pales in comparison to the body of research on adult learning in general. One variable that can safely be factored out of the equation is age. There's much more that unites the corporate workforce than divides it. The adult learning theory of Malcolm Knowles is as good a description of your average GenX/Y/Z as it is of a typical baby boomer (Knowles, Holton, & Swanson, 2005):

- *The need to know:* Adult learners need to know why they need to learn something before initiating the learning process.
- *Learner self-concept:* Adults need to be responsible for their own decisions and to be treated as capable of self-direction.
- *Role of learners' experience:* Adult learners have a variety of experiences of life that represent the richest resource for learning.
- *Readiness to learn:* Adults are ready to learn the things they need to know to cope effectively with life situations.
- *Orientation to learning:* Adults are motivated to learn to the extent that they perceive that it will help them perform tasks they confront in their life situations.

Instead of worrying about the generation gap, energy should be spent focusing on making the experience interesting and useful as learning in and of itself and designing an experience relevant to the person, not some abstract group.

Exploration is more engaging than recitation. Doing things with some measure of control is better than authoritarian lock-step. Telling people things they already know is less likely to keep them engaged than exposing them to new worlds. Giving them a reason they can identify with is more effective than saying "because I said so" as a rationale. Nothing new there and nothing that's got much of anything to do with whether I'm 18 or 48 years old.

What Does All This Mean in the Day-to-Day?

Now it's time for our mythic two-handed economist to get off the dime. How can learning professionals take the insights provided by

their warring angels and turn them into action in the daily pursuit of their profession? Here's my take.

Awareness

Of course, there will still be a learning function. The nature of a volatile world simply demands it. People are too busy and not always ready to respond to change because they're not looking at the big picture when change strikes. Nevertheless, a centralized, walled-off group that only talks to itself, its peers, and industry soothsayers is setting itself up for trouble if not irrelevance.

Make the borders separating the compartments more porous. Spend some quality time with the members of your audience, get to know their view of the world, bring them into the planning process. Learning professionals are always asking for a seat at the table. Maybe it ought to work the other way. The learners should have a seat at the learning function's table. You never know what will pop up at a good lunchroom bull session!

Motivation

Motivation is paired with awareness. The more people see that they're involved in the process, the more engaged they're likely to be. The closer you are to the learner, the more likely you'll be delivering an experience that he or she immediately sees is valuable. You can also do a much better job of providing a communication loop that keeps learners aware of the value of what you're providing. Of course, if you're going to open up the communications and start actively touting your contribution as a learning professional, be sure that you make good on the claims.

Personalization

Again, both sides of the discussion are true. Rather, the truth lies somewhere in the middle. How do you find that optimal point? Making an audience analysis a mandatory part of any program design isn't a bad place to start. I did an analysis of the audience at a global investment bank and identified three distinct demographics, each with different backgrounds, motivations, and work environments—and that didn't take account of regional culture or language. Paying attention to these

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profiles made a world of difference in program design and delivery. Designing programs that allow learners to test out of the program, in whole or in part, is another strategy for solving the problem that also builds goodwill and increases efficiency—unless some version of the number of butts in seats is your metric, in which case you’ve got a problem going in.

It is not practical to treat all learners the same because experience and personal history make every person’s starting point unique. However, creating a training program that focuses separately on each individual is impractical. The key to success is finding a balance between group and individual focus.

Theory

Theory is tied to the previous issue, personalization. Distinctions do matter, but they don’t matter absolutely. Providing alternatives can help bridge any gaps related to age, experience, or education. Most important, awareness and understanding of both the audience and the needs of the organization in all their richness are critical—another balancing act that learning professionals have to master. There aren’t any silver bullets, just a lot of hard work and careful thought.

Overcoming the Lies With Truth

Learners: You can’t live with ’em, and you can’t live without ’em. Yeah, I know, this statement is about as old as the koans (Yamada, 2004) discussed in a Philosophy 101 course or the jargon shoveled around boardrooms (Fugere, Hardaway, & Warshawsky, 2005), for example:

- The next sentence is true.
- The previous sentence is false.
- The sound of one hand clapping.
- Get used to it. Make it your friend.

Nevertheless, it should be clear that the underlying argument here in defense of the faith is the tension between perspectives emphasizing either the particular or the general views. Most learning professionals ply their craft within organizations, that is, collections of individuals

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engaged in group activities with the goal of promoting some collective good. At least, the hope is that it's for the good, the Enrons of the world notwithstanding.

Integrity and professional standards drive learning professionals to protect the individuality of each learner whenever possible. Demands of time and resources necessitate reliance upon LCDs for efficiency. These opposing perspectives and the decisions they necessitate shift continually, creating the music that learning professionals dance to daily.

Here's hoping this brief discussion has added some lyrics to that music.

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The Lie	The Truth
Learners need the guidance of a top-down learning organization.	People are increasingly aware of their own career development and respond to market forces faster than an organization can.
Learners already know what they need to know; we just have to get out of the way.	The modern work environment is too complex and fast changing for an organization to trust solely in self-development.
People don't really care about learning, just results.	Presented with interesting and valuable possibilities, people enjoy the learning process itself.
Learners take it on trust that a learning event will be valuable experience.	In the age of broken social contracts dealing with employment, people need to be shown just why a learning event will be beneficial.
Learners are essentially the same.	Each individual has his or her own need for self-expression, validation, and career development.
Every learner is a unique individual.	Focusing on differences can paralyze an organization.
Younger learners are inherently different from older ones.	Human beings have much more in common than anything that might set them apart.
Age doesn't matter.	Learners under the age of 30 have grown up in a radically different world compared to their "elders." To ignore this fact is to set yourself up for trouble in reaching your audience.

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