Creating a Safe Place to Fail

Building resiliency through scenario-based learning.

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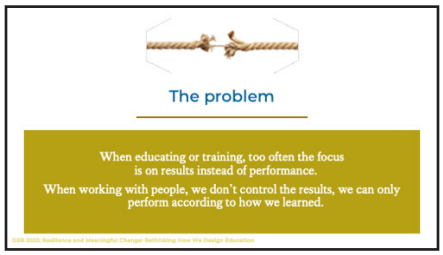
The problem

Training and edcuation are too focused on results instead of performance. This focus creates a false sense of confidence in participants that if they perform the specific way, they will get the results that they expect every time.



In some fields, this is more or less reasonable, like math, but when you start teaching or training people on dealing with humans or technology, this isn't always the case - even less so with other people.

Participants are shown how to do a thing, they practice that thing, then they are assessed doing the thing the way they learned. When dealing with human beings who have choice and technology that can fail randomly, we build into the participant a false sense of security that if they always do X, Y will always be the result.

But, in many cases, it isn't. When working with other people, they have a choice. They have free will, make choices, and act in their own interests. So, if they don't want to do X, Y will not be the result.

We see this abundantly in sales and law enforcement training. Participants in these fields are trained by instructors to overcome objections or "de-escalate," but the training is focused on the results. If they over come all the objections, the person will buy; if they communicate calmly and compassionately, the person will comply.

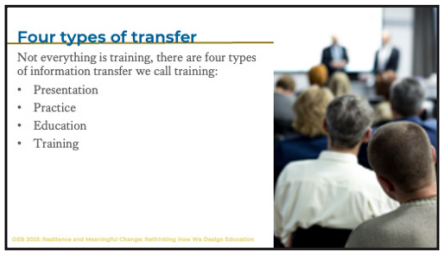
But that isn't what happens in real life. Not everyone purchases what is sold, not everyone does what the police asks them to do. When these "failures" occur, the salesperson or the police are blamed for failing - they didn't get the results of their performance - the results were *conflated* with performance.

In reality, the salesperson or police could have performed perfectly: people are not input out put machines. The person who was the focus of their performance still has choice - they chose not to buy or comply.

This experience becomes destabilizing. The salesperson loses confidence because not everyone will buy, so they think, and their managers believe, they are not performing their job well. The police officer has to use different control tactics and society says they failed and need more training.

Neither need more training, they need more realistic training - realism being what to do when they perform as expected but the other person makes a choice that doesn't go with what they expect.

The four types of transfer



First, we need to establish what is really training. One of the biggest issues in Learning and Development (and even more so in highly regulated industries because the regulatory bodies care about time more than delivery) is that there is a lot of things called training, which are *actually* not training.

We have been conditioned to view every time a person stands in front of us to share information or we click "Start" on an eLearning, that this is training. However, just because someone calls something training doesn't make it so. It is a paradigm that needs to be fixed in all industries, especially in the training industry, who is the biggest perpetrator of it.

Presentation

How often have you gone to something that was called training where you sat, listened, asked a few questions, and left? It was called training. You got training hours for it. But you feel like you just ticked a box of "training" with time allotted but got nothing out of it - all that was counted was you sitting in a seat. Well, the sad and good news is, it wasn't training. You aren't crazy.

You participate in an event where the instructor disseminates a great deal of information. They list learning objectives that say you will be able to "know," "identify," or "discuss" your new information, but there is no assessment at the end of it. You did not attend training; you attended a **presentation**.

They may list learning objectives. They may even provide an assessment, but then tell you the assessment doesn't actually count for anything. It isn't training, it is a presentation that has been wrapped in a title of "training." Unless you do something that is measured and there is a risk of not getting credit for participating and performing at a level of competency, it is not training.

Training implies skills acquired or improved performance. If performance is not measured, then there is no accountability. Without accountability, there is nothing establishing whether knowledge transfer or performance competency was accomplished.

Practice

You participate in an event where the instructor provides a lot of information and demonstrates a task, gives you background and explanation, and then coaches you through performing that task repeatedly. They list learning objectives that say you will be able to "know," "identify," or "discuss" the topic of the event, but there is no assessment at the end of it.

As they are coaching you, they may tell you they are assessing your performance, but then tell you the assessment doesn't actually count for anything. It isn't training, it is practicing a task for improvement or for honing a new skill recently taught or existing skill. Unless you do something that is measured and there is a risk of not getting credit for participating and performing at a level of competency, it is not training.

Practice is essential to training, but unless there is an assessment of that performance with a pass/fail component to it and it counts as credit for something, it isn't training. Training requires demonstration, practice, performance, and assessment of performance. When practicing, you

are performing a task repeatedly, being assessed in real time, but the expectation is improvement, not developing new or changing behaviors.

Education

Education alone is not training. Education measures knowledge transfer. You may have to perform to a certain level, but you aren't performing a task or developing skills, you are learning, processing information, and developing knowledge.

You participate in an event where the instructor disseminates a great deal of information. They list learning objectives that say you will be able to "know," "identify," or "discuss." They have an assessment that measures the knowledge transfer and, if you fail, you will not get credit for participating in the event. You did not attend training, you were **educated**.

If you aren't actually performing a task in the event, you are not training. You are learning, you are gaining new knowledge or changing your mind about past knowledge, and there is knowledge transfer, but you haven't been trained to do anything.

Training

Training is task-oriented with an expected performance outcome. All training requires knowledge transfer (education), but not all education includes performing a task.

Say that you participate in an event where the instructor disseminates a great deal of information. They list learning objectives that say you will be able to "know," "identify," or tasks you will "demonstrate." Then they demonstrate how to do a given task and have you practice the task. They have an assessment that measures the knowledge transfer ***and*** the performance of doing the task and, if you fail, you will not get credit for participating in the event. You have now gone through **training**.

This really is the only definition of training. This is creating new or changing current behaviors.

There is nothing wrong with a simple presentation, with practice, or with education, but the expectation of the results needs to align with the type of event that is being provided. If there is no task performed or assessed, then it shouldn't be called training.

As instructors and instructional designers, knowing the "what" you are building is important. Until you can get a change in the semantics of what you are doing as instructors, you are going to continue to see anything communication delivered to an audience as "training." This makes our job harder and blurs too greatly what you are delivering our employees and those they interact with.

Summary

Each type has its place and purpose. These differentiations aren't meant to diminish the usefulness of each. There are many times where a presentation is sufficient. They each have value in their own right. Identifying what you are actually delivering can help you set the boundaries and expectations of what you need to create, as well as set expectations to those who are expecting a certain result from your development and delivery.

To recap:

- A presentation only disseminates knowledge.
- Practice only rehearses task performance.
- Education disseminates knowledge and then assesses knowledge transfer.
- Training disseminates knowledge AND develops task performance, then assesses knowledge transfer AND performance competency.

- Presentation is not practice, education, or training.
- Practice may include presentation, but it is not education or training.
- Education includes presentation, but it is not training (Rehearsing memorization is not practice).
- Training includes presentation, practice, AND education.

Story time

In corporate training

I worked for a web hosting company in the mid-20teens. I have been in the web technology space since 1996 when we were excited about HTML 2.0 and the ability to add tables was a big deal.

I started with the company as a Tier 1 tech support, which was easy for me - I already had almost 20 years of experience with all things web hosting and this was actually the company I hosted my sites with.

Next to me in new hire training was a young lady whose only work

experience was at hamburger place like Five Guys and all of her internet experience was going to YouTube.

The training consisted of two weeks of fire-hosing information in no relevant or reasonable way, then three weeks of On the Job training (OJT). The two weeks of in-class training covered all things web hosting, four different computer systems, troubleshooting, and sales. None of it performed together or in order of when they would use any of the information.

I sailed through and had it easy. She was stressed. When we got to OJT, I didn't have any problems. My young friend was stressed, scared, and would cry often because she was overwhelmed. I started helping her directly and, at first, the instructors were getting after me because my call volume was low, until they realized I was helping other participants with their calls, and they left me alone. Six months later, I was promoted into the training team as an instructional designer.

The problem this original training had was that there was no time to practice using all of the systems, having a conversation, troubleshooting and sales, in real time, in a safe place to fail - there was no scenario based training.

In law enforcement training

After the George Floyd incident, society screamed for more training for law enforcement and more training in de-escalation. Previously, de-escalation training was a specialty course for Critical Incident response like barricades, hostage rescue, or suicidal subjects. De-escalation training became standard in basic training and agencies require their personnel to have de-escalation training.

The problem is, it is training in a silo - there is no context to it. Training amounts to "do this thing and you will de-escalate people." They have scenarios in the training, but it is all results focused - if you de-escalate, people will de-escalate.

What has happened instead is injuries and fights have increased for both civilians and law enforcement, yet law enforcement are always to blame and considered failures because people didn't de-escalate. The reason is because they are not trained to recognize when de-escalation is not working and find another path.

Instead, police de-escalate longer only irritating the subject, who then acts out violently. If someone is charging at you with a knife, they are not de-escalation, yet police are still trying to do so, getting injured or killed in the process. Or, they end up killing the person charging them.

Instead, de-escalation training should include scenarios where indicators of non-compliance are displayed, letting them know de-escalation isn't

working and they need to find another solution. Often, distance and time is the best and easiest way to handle a lot of these, but they aren't trained for that - instead they de-escalate until someone is harmed.

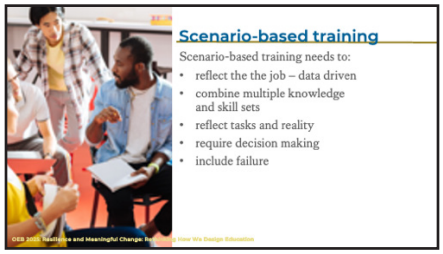
In education

The only place where scenario-based learning really exists in education is in debate class, where the teacher engages as the adversary and forces the students into a corner where they have no way out - that is scenario-based learning and it gives them a safe place to fail.

In most other educational fields, this doesn't happen. In teaching courses, teachers are trained how to handle bad behaviors and, as they roleplay there way through it, if they do what is expected, the student complies and life goes on.

This isn't reality either. With behavioral problems, what does a teacher do when the student argues back and won't behave? What does the teacher do if the student gets aggressive? If we don't include these potentials, the teacher is left in the same place as Tier 1 tech support and the police officer - in a state of shock, rapidly trying to find an answer, and not knowing what to do. Also, just like employees and police officers, the teacher is blamed for the result of the students behavior, instead of being assessed for their performance. The teacher may have done everything right, the student chose not to listen or act accordingly, but educating teachers doesn't include this.

Scenario-based learning



A lot of education and training claims they do have scenario-based learning and assessments, but, in reality, they have stories with subjective evaluation of the instructor. This is part of the problem with a lot of scenario-based learning currently.

For scenario-based to be effective, it needs to:

- reflect the job – data driven
  This means the scenarios need to be based on what a participant will really expect in the performance of their tasks. Data-driven means that research and observation needs to be performed to determine what the ratio of experiences would be.

  For instance, in a sales training course I was working on, I discovered that top-performers in sales were making more calls than lower performers and spending less time on the calls. It wasn't just heir overcoming objections, it was they could tell when someone wouldn't buy and then move on faster. Lower performers would spend more time on a call trying to sell to someone the top performers would have abandoned.

The scenarios matched the 9 to 1 ratios - 9 no-buys for every one sale. The no-buy calls lasted from 5-10 minutes. This reflected the reality of the job, instead of how they were trained that if they did this one thing, everyone would buy.

- combine multiple knowledge and skill sets
  Creating scenarios needs to mimic the environment that they will be performing tasks. If they are using multiple systems to perform a task, they need time to adapt to using multiple systems before they are given real work. If they have to multi-task in a fast paced environment, they need time to practice combining all the new skills and knowledge in a mock high-paced environment.

  They can only meet competency when they have the opportunity to make mistakes in a place that doesn't impact their metrics or marks.

- reflect tasks and reality
  There tasks should look like real tasks. If they are using new technology, they should have sandboxes or sample accounts that they can work in. The scenarios should include system issues, how to correct their progress if they are going in a different direction than they should on a system, and how to overcome bad information they may be given that represents common mistakes and issues they will face when working or performing with real people.

  In education, there are abundant ways of doing this. In engineering, problems should be given where there are mistakes int he datasets. They discover the dataset issues and ask for corrections. The performance of their analysis was done well if they find out it doesn't make sense - just like they will in a real job.

- require decision making
  One of th big misses in education and training is that we give information and ask people to regurgitate that information, but we aren't training critical thinking or decision making. Instead, we get automatons who stall when the inputs don't make sense and have no idea how to correct it. Or education and training should give them the knowledge and understanding they need to perform tasks, but then they need to learn how to adapt and overcome errors they will face when they are out of school.

  Testing could include that the question is the *wrong question*, not just that there is a right answer.

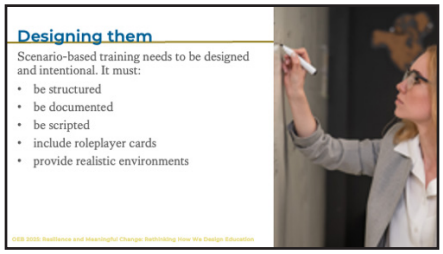
- include failure
  This is the results perspective of failure - they did exactly what they were supposed to do and may have done it well, but they didn't get the results they expected - what do they do now?

  This is where they build resiliency in a safe place to fail. They learn

how to process through the unexpected result, have their good performance reinforced, and learn that they are not a failure as a person. Just like failed results being conflated to failed performance, participants conflate the failed results to failed performance, but go one step further - they feel like failures as a person.

Building confidence that the result is not who they are and that they can only control their own actions and reactions, this builds resilience as well.

Designing scenario-based learning



In order for scenario-based learning to be effective though, it needs to be designed and intentional. Too often scenarios or roleplays are indicated with a quick paragraph of describing the scene or is made up entirely on the spot. Instead, scenario-based learning must:

- be structured
  Wherever possible, they should be intentional activities, planned for when and where they are used, specific to the task or the combination of tasks for the material being delivered, and relevant to the course and expected outcome. Scenarios for the sake of entertainment turns them into games and diminishes the value of any further scenario learning.

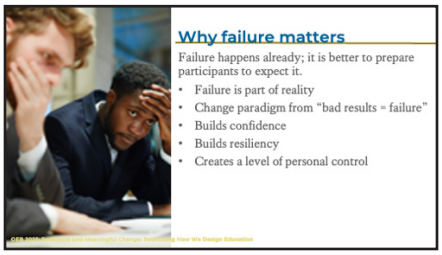
  They should also be taken from real world experiences, as well. For instance, to build scenarios for the Tier 1 tech support course I redesigned, I listened upwards of a 1,000 calls to get 50 that would make good scenarios.

- be scripted
  Scenarios should be structured through documentation and thorough explanation. It sets the scene, the affect of the roleplayer (if there is one), the conditions, boundaries, and performance expectations. The expected outcome is competent performance, not the result of performance.

- include roleplayer cards
  If there are going to be roleplayers, they need to have a roleplayer card. These are commonly referred to as scripts, but they are not controlling what is being said, the roleplayer should be able to hold a conversation, they are to be used as queues to what to say or how to respond to the participant. This includes prompts for things they are not doing as well as doing.

- provide realistic environments
  If the tasking is using a computer and a phone while engaging with a customer, then a computer with the systems needed, a phone, and a roleplayer on the other end need to be the scenario. The more scenarios become “make believe,” the less relevant they are.

Why failure matters



Failure happens already; it is better to prepare participants to expect it.

- Failure is part of reality
  We have to get education and training away form the "perfect world" paradigm that a lot already dwells in. When we don't include failure in learning as a reality of any task, we set up participants for emotional and psychological harm.

  The result is high attrition and low retention in the work place at best, PTSD and psychiatric issues at worst. Without being aware that failure is a likelihood, people hold themselves, and the companies they work for more so, to a false standard.

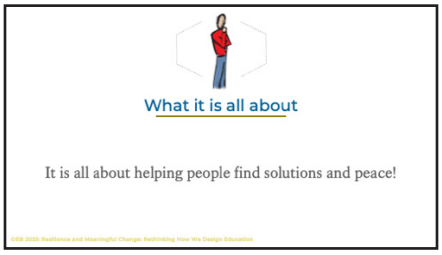
- Change paradigm from "bad results = failure"
  Bad results aren't failure, only bad performance is, and we shouldn't even call that failure. Bad performance is only failure if the participant refuses to correct their behavior and performance. Otherwise, it is just a learning opportunity.

- Builds confidence
  By building failure into training, it builds confidence that they can overcome. They either overcome through finding a solution, a work around, or another path. Sometimes it is just knowing when to stop what they are doing and move on to the next opportunity, like in sales.

- Builds resiliency
  Building confidence also builds resiliency. When they have an understanding that not everyone is going to purchase, not every subject will comply and I can handle it, and not every dataset will have the right data and I know how to find it, the stress of hitting a blocker is reduced because they now have confidence and options to exercise.

- Creates a level of personal control
  It all comes down to giving participants levels of personal control. If the result isn't what they expected, they feel out of control. If the result is something that they know is a possibility and they have something close to an answer, they feel more in control, confident, and capable of performing competently. The result doesn't become who they are, it becomes a part of the possible reality, so it doesn't necessarily undermine their self-perception.

What it is all about



It is all about helping people find solutions and peace!

We want people to be able to solve their own problems, find their own

solutions, and feel confident in their capabilities. This is what creates resilience. When they feel that they are in control, they have answers, and their current experience is within the realms of possibility, they have greater peace of mind.

We want people to feel that they are empowered to make decisions - even if, ultimately, that decision is “this isn’t for me!”

The presenter

If you have any questions, comments, or would like to talk further, please feel free to contact me at rick.jacobs@jacobsetal.com. If you would like to connect or follow me for my posts, use the Miitap QR code to find all my contact.

Thank you for attending!