eBook

UPSIDE LEARNING
A Division of MITR

Skilling for Performance

A Strategic Imperative for Organizations

Introduction

'Skilling' *- The ability to use one's knowledge effectively and readily in execution or performance.*

Merriam-Webster Dictionary

Suddenly, everyone's concerned about skills, to the extent that we can even talk about 'skilling' as an action. It may mean choosing skills, assessing skills, or developing skills (and we'll talk about all of them), but it's also an area with a great degree of uncertainty. In trying to get our own minds around it, we've learned some things we'd like to share. So, we're talking about skilling as 'a thing'.

At the core, skilling is increasingly essential. The rapid rise of generative artificial intelligence (genAI) has shown that new skills can be hard to predict, and harder to get on top of. It also shows, however, how important those abilities are for organizations. Further, the rate of change isn't predicted to slow.

Our takeaway for skills, then, is that it's an organizational imperative. That said, then, what do you need to know? Here's our take.

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Skilling as an Organizational Priority

If skilling is a critical capability for organizations to deliver, going forward, what do we need to know? First, we need to stipulate what is a 'skill'. Then, we need to address why aren't our existing approaches sufficient.

The underpinning context is an increasing rate of change. Executing the things you know you need to do is going to be just the cost of entry. The ability to adapt to agility is going to be the new differentiator for organizations. Thus, the ability to establish, assess, and develop (or acquire) new capabilities, at speed, will be essential.

What

So, what *are* skills? For us, skills are about the ability to 'do'. Merriam-Webster's definitions include "a learned power of doing something competently: a developed aptitude or ability". There have been various terms bandied about competency, ability, skill, and more. We're less worried about the terminology and more about what it means we need to execute against. In particular, we're thinking about those developed aptitudes or abilities that organizations need to execute their strategy. Which they may or may not have, and if not, need to acquire.

Robert Mager has defined performance objectives as a particular behavior, that is used appropriately in context, with some measurable outcome. This, to us, maps well to the definition: we can't consider it extant until we can ascertain that it's been acquired, which means we can measure the outcome, qualitatively or quantitatively. We've previously argued that this is a critical distinction, having outcomes that are an improvement in performance leading to an impact on the organization.

Note that this is *not* just knowledge about *how* to do something. In cognitive science, this is referred to as 'inert knowledge'. You know it to the extent you can pass a test on it, but in an appropriate context, it won't get activated. What we know about learning says that to be able to do, you need to practice doing. You may use knowledge to guide your performance, and you need feedback referring to that knowledge to tune your performance, but the knowledge is secondary, and the performance is primary. This is the reason why performance support *should* be in the toolbox of solutions. That is, the ability to perform is more important than whether that's with support or not. What matters is your ability to do things that the organization needs.

One of the problems, too frequently, is people leaving descriptions at too vague a level; at a level where you can't really determine whether it's been acquired. A classic case is 'leadership'. To successfully develop leadership, you actually need to develop the component skills. Under categories like communication, planning, evaluation, and more, there are skills that comprise these abilities. An important step is breaking down the outcomes you need until you identify the component skills.

Why

Skilling is increasingly important. Change is happening, and organizations need to adapt. That means they need to determine what to do, and then be able to execute. The ability to execute depends on having people equipped with the necessary know-how to deliver. This is where skilling comes in.

The rate of change is increasing. That is, the amount of change isn't just increasing, the rate at which the amount of change is changing is increasing. That is, it's exponential growth. This isn't new, but we have to recognize that it's not just continual, but it's accelerating.

Generative artificial intelligence (Gen AI) is a good example. Two years before writing this, for instance, generative artificial intelligence (Gen AI) wasn't a thing. Now it's *the* thing! The 'gold rush' mentality for Gen AI may be fleeting, but the long-term implications aren't. Every vendor is now claiming to be AI-enabled, and most companies are looking for opportunities. However, there are issues to be addressed, both pro and con. To be able to make decisions about Gen AI, however, you have to know enough to determine what to buy, what to build, and what to avoid at all costs! There's knowledge about Gen AI, but then there's the necessary skill to apply that knowledge to make determinations for the success of the business.

The bigger picture is that Gen AI is only the current focus. Yet there are changes in practices, technologies, and more. To take advantage of these opportunities requires knowing if they're legitimate and relevant, and then how to leverage them. These are skills.

Those skills may already exist in your organization, or they may not. If they're not, how are you going to acquire them? That, in short, is what skilling is all about; coping with rapid changes by assessing what skills are needed and how they're to be addressed.

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The Skilling Process

How does one ‘skill’? The current context indicates why skilling’s important, as a result of the increasing rate of change. This means that our ability to determine necessary skills, particularly going forward, and then assess our current levels, is a necessary precursor to being able to make a decision to ‘build or buy’.

As a consequence, assessing the current state of skills in the organization is increasingly a part of learning & development (L&D)’s scope of activities. L&D has typically been focused on developing skills, but determining the status of skill presence is increasingly a concomitant role.

Identifying (analysis)

While identifying skills hasn't necessarily been the responsibility of L&D, that's changing. Organizations are going to have to look ahead, and it's an open question where the locus of that activity will lie.

Kevin Wheeler, President of the Future of Talent Institute, has suggested that, increasingly, skills should be an ongoing strategic advantage. Organizations need to forecast forthcoming skill needs and work to address them proactively. If the identification of needed skills is a necessary precursor to assessing the spread of skills in the organization, determining 'buy or build' requires foresight in coming capability requirements.

There are several parts to this. The first step is identifying what needs to be done as the organization stands. While this would seem obvious, too often organizations have neglected this step and instead respond reactively, perhaps when problems arise. Instead, organizations are too frequently just asking for particular interventions as problems crop up, and not necessarily identifying the key gap.

In addition, one needs to know where one is going. This is a strategy and goes beyond the role here. What matters is understanding the direction the organization is going to support in developing a skills profile. Then, the directions need to be broken down into essential skills. With this foundation, the next step can occur.

Finally, there are the situations that emerge that aren't planned or extant, but impinge on existing operations. New technologies can arise, as mentioned, or processes, or practices. Organizations have to be able to adapt to these, too.

Assessing

The next step is, of course, assessing the current state of the necessary skills. For things that the organization is already doing, that's likely accomplished, but it's been idiosyncratic so far. As things change faster, organizations are going to have to be systematic in assessing skills as a core competency.

Koreen Pagano, Chief Product Officer at Thrive and author of a forthcoming book on skills suggests that this is the most challenging part of the process. While there are a variety of methods available, they each have strengths and weaknesses. As it stands, no one approach is superior overall, and contextual needs currently dictate the approach to be used in any organization.

However, organizations still need to accomplish this task. While approaches may emerge that are better, as it is organizations still need to see how they are, or are not, meeting needs.

Developing

An alternative to developing skills is to source the necessary skills from outside the organization. While typically not in the remit of learning & development (L&D), sometimes it will make sense to acquire necessary and missing skills via recruitment. It's an alternative to developing skills internally, which is typically in the realms of L&D. However, taking a high performer from elsewhere isn't guaranteed to lead to high performance in a new context, so the development of necessary skills becomes a preferred solution.

When it comes to developing skills, frequently organizations have done this based on false assumptions. Done properly, L&D has been able to demonstrate systematic skill improvements. Too often, however, improvement has been purportedly demonstrated by learner's self-assessments of the learning experience. Or, somewhat better, self-assessment of their own learning. However, self-assessments are notoriously inaccurate without rigorous design.

Thus, skilling needs rigor at each stage. When we identify, assess, and develop skills appropriately and in a timely manner, we're delivering the capability our organizations need.

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Skill Analysis

As organizations operate and adapt, there are two types of skills they need. First, they need the skills that meet their current needs. While this seems obvious, too frequently organizations are haphazard at best. A second area is that of anticipating future needs. Despite the famous saying "never predict anything, particularly the future", increasingly we need to be looking forward and anticipating. We also may need a triage mechanism for skills we *didn't* anticipate.

A key element here is triangulation. We should look to multiple sources of information to obtain the richest picture we can. Any single source may be biased by subjectivity or lack of sufficient data. We increase the likelihood of being correct when we compare different sets of information and converge upon a synthesis.

Current Needs

There are potential gaps even in meeting current needs. For instance, our role descriptions may be inaccurate or out of date. Folks may be doing different things than what they were hired, promoted, or reorganized to do.

Still, one source of information is asking folks what skills are needed. Depending on the size of the organization and the need, this can range from focused interviews to a survey. Regardless, we are asking for people's ideas about what they need. Which isn't ideal, but is practical, and is one source of insight.

A more direct way of identifying the necessary skills is to look at the flow of work. Here, we're analyzing the outputs that are developed and the skills that are required to generate them. This is the approach that performance consulting suggests, as suggested in Guy Wallace's *The L&D Pivot Point*. The effort required can be substantial, but the insights are highly accurate. This likely makes sense for business-critical operations.

A final source comes from outside the organization. Here, we look at what competitors are doing, or what external sources stipulate as the process. For instance, the International Board for Standards in Training, Performance, & Instruction has developed competencies in several roles such as instructional design and instructor. Other areas have other such stipulations and processes, for better or worse.

A similar approach would be to look at what competitors are doing. This may be challenging for organizations in commerce, but in other fields such as institutions and not-for-profits, such sharing might be viewed as collaborative. Analyses can also be commissioned.
These sources, ideally several, need to be collated and consolidated. The resulting list of skills then is a basis for determining how the organization is equipped to execute what's known to be needed.

Future Needs

The more challenging task is to identify future needs. Some such direction can come from the organization's intents, as expressed via strategy. Other information comes from analysts and projections. Certainly, too, there are unexpected shifts that require adaptation, whether a pandemic, social/political change, or technological innovation.

For strategic directions, the executive team and associated units may have intents, but they also aren't necessarily likely to have drilled down to the level of component skills. Thus, this further level of analysis is one area that's likely to need to be accomplished.

A second source of potential is industry trends, whether specific to the organization's domain or more broadly. Analysts at both levels regularly provide such analyses, though frequently at a price. Such analyses can provide a good indication of directions that are likely to be seen, particularly if they're the outcome of a government focus. Not all will be at a useful level and may need deeper definition, but others can include the necessary skills.

Unexpected outcomes are also likely to be analyzed, though there is likely a lag and a lack of accuracy may accompany the initial estimates. These specifications should be looked at with some skepticism, and filtered through the organization's perspective. As time goes by, the quality of the estimates is likely to improve.

The resulting list of skills, both current and coming, will then need to be internally evaluated to identify needs and prescriptions for either acquisition or development. Having multiple sources, triangulating is a way to build a richer picture than any one approach would provide. There is an inherent amount of speculation in the proposals of future needs, but it's still better to make an informed assessment than to be completely unprepared.

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Skill Assessment

Assessing the skills emerging from the skill analysis is the second step. This is a challenge, as there are no specific methods. The information available isn't typically aligned with this need, or the requirements are considerable. The industry is still in flux here, with a growing recognition of the need for skill alignment, but there's a legacy of focusing on roles on the organization side and accomplishments on the performer side.

Again, triangulation is a plausible approach in the face of uncertainty. If, as was stipulated earlier, this is the most challenging of the tasks, we will be better served by looking for converging evidence. Thus, triangulation makes sense, and several sources may be needed for different skills.

Types

There are two dimensions that make sense for ascertaining skills. For one, we can determine whether information is objective or subjective. While objective information is a better basis, such measures may not exist. We can have objective data where there are tangible measures, but in lieu of such data, we will have to depend on opinions and do our best to address the potential sources of bias.

A related issue is whether the skill being assessed is for so-called soft skills or hard skills. Hard skills typically can be accurately measured, but skills that are interpersonal in nature may be more influenced by context. Again, we will have to do our best to be as concrete as possible about the skill and the evaluation.

Methods

The methods we have available for assessment are in three sorts. The first two are subjective, self- and other-assessments. Performance assessments are superior but can be costly to develop or acquire and administer.

Self-assess

Self-assessment is the easiest. In short, you survey performers for their evaluation of their own capability, determining their standing on their ability in the skills associated with their demands.

Ideally, you'd provide categorical specifics ("When I work with customers, I a: still struggle to address their emotions, b: have trouble identifying the root cause of the issue, ..."), rather than more general categories ("My ability in this is a. Limited, b. Adequate, c. Comprehensive, d. Exemplary"), but the work required is of course more.

There are also sources of bias. Common ones include performers' own self-awareness, the comfort of admitting to lacks in the cultural context, and more (gender can notoriously affect self-evaluation, for instance).

Such biases are to be expected, and efforts should be made to mitigate the effects. As above, providing clear intent rather than generalities can help, as well as making responding easy as opposed to onerous.

Behavioral interviews can be designed to be more accurate. Here, you are asking the individual to recall situations where they performed and recount the steps and outcomes. These are used in interviewing candidates for positions, and can also be less biased because you're asking about actual situations. They can be faked, but they're better than self-assessment.

Observation

A second category is observations. Here the judgement is made by someone other than the performer. This can be superior to self-evaluation, as the individual should be more objective. This doesn't always hold true, as research suggests some evaluations can say more about the evaluator than the performer!

Options occur here. The evaluator's relationship with the performer can be one of mentor, supervisor, peer, or customer. The more independent, the better (so independent observers are better than supervisors or customers, for instance; bias is a barrier). Training on the evaluation can also improve the outcomes, but again also requires more development resources.

Also, the data can be *in situ*, so the observer is in the context, or it can be captured by video or system, such as a log of customer/performer chats. With appropriate evaluation mechanisms, the abstract evaluation of performance can be more objective.

Performance

The ideal assessment is actual performance. This can include evaluating work products, output of systems, and simulated work environments.

Here we are either investigating the output of their tasks, or simulated acts.

For one, if performers' tasks require output, such as documents, these can be evaluated. Ideally, a rubric is created to make it objective. If they're in any media that establishes an independent representation, these can be evaluated.

If the performers are using a system, their use of the system can also be evaluated. Aggregate data from interactions with systems can be evaluated for efficacy. So, for instance, any application can create its own data, or be instrumented to report usages through systems like the Experience API.

Finally, we can create simulations where learners have to perform tasks that require the application of skills. Creating these simulations can take time, but they may exist from learning development. They may also be purchased.

Other

In addition, people can ascertain skills from credentials as well. Those may use the methods above but frequently have been developed in objective ways. Credentials vary in quality, but the best provide good insight into capabilities.

Together, the evidence captured from these forms of data should give you a picture of where the organization is in its needs for skills both currently required and for future directions.

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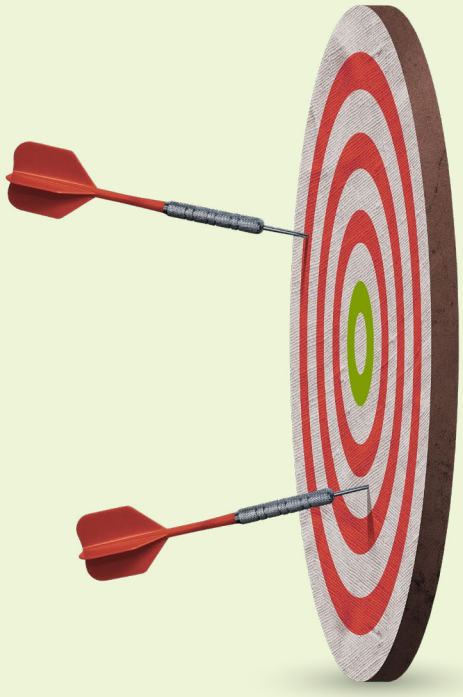
Skill Development

When a need for skills is determined, then there are two options, acquire the skills or develop them. While acquisition of skills is an option, the execution thereof lies with recruitment, which typically is *not* an area that learning & development (L&D) addresses.

There are strategic reasons to start thinking of skilling as a coherent whole, instead of disparate functions. This would require a reorganization that puts identification, assessment, and recruitment and/or development of skills as a single entity. We've identified the tasks required except for recruitment, as that's an entire suite of its own capabilities.

For the record, in previous discussions on impact and performance, we identified performance support as a viable option. That's a substitute for skill when skill development is unlikely, costly, or difficult to develop. When information in the world *can* substitute for skill, it could and generally should. Further, it should be considered as at least part of the solution in any case. For discussion here, however, it will not be mentioned further.

Developing skills is the natural home of L&D. Here, we use our methods of training, coaching and mentoring, and informal learning (including community). Of course, what matters *is* doing them in ways that reflect what we know from the learning and cognitive sciences to do it right.



Training

There are several ways to deliver training. We typically use an 'event' model, whether delivered live face-to-face (F2F) or virtually, or asynchronously. We also should be following up on the learning, through a potential variety of methods.

What should *not* be done is to consider information presentation as a sufficient mechanism. Perhaps predicated on models of cognition that suggest we're formal reasoning beings, and therefore with new information we'll change behavior, such approaches are all too prevalent. However, research tells us that to develop necessary and persistent change, meaningful practice with feedback is required.

There is a benefit from information to support practice, which includes models and examples. There's also the emotional aspect of awakening learners *to* the learning, and closing the learning experience. Noting the valuable components and aligning them with learning requires going deeper than considering this all under the rubric of 'content'. That is, understanding the role each element plays and executing against the nuances is also important.

Overall, training is a powerful tool, but with the caveat: *when done properly*. There are plenty of resources about how to design training in alignment with the outcomes of research, and these should be consulted and used.

Follow-on

In addition to initial presentation and practice, we also know spacing is required. Reactivation of the necessary components over time is required to take initial learning and turn it into a sustained change. Again, designers must understand the nuances and the roles they play.

Reactivation

As a cognitive underpinning, there are two essential components for learning to occur. *Elaboration* is how we take an initial idea, and connect it to our pre-existing knowledge. Multiple ways exist to accomplish this. Then, we also need to *retrieval practice*, asking learners to use the information in context. More valuable here is doing so in ways that are most similar to how information will be applied in practice. It's not the retrieval alone that matters, but how it is retrieved.

Mechanisms that support elaboration are involved in re-processing the information. Generative approaches, where the learner regenerates the information, include paraphrasing in one's own words or creating records in other media, typically visual representations such as diagrams ala mind maps, or sketch notes. Another approach is to have the learner use the information to explain things in their past or create ways in which to apply the knowledge going forward.

Retrieval practice benefits from nuances as well. First, just retrieving information just develops the ability to access it, not to use it. Increasingly, the need is to use information is to make better decisions. To develop the ability to apply knowledge to choose courses of action, learners must practice that same. It also turns out that practice applying knowledge *also* ends up developing knowledge retrieval, so really only the former is needed.

We can also ask questions about how it's going in the real world. We can ask for plans beforehand, ask if there are barriers as the plans are implemented, and ask about the impact. All of these extend the learning experience. We can do this by connecting with people, or through system-generated prompts. The data from these inquiries is also useful to the organization.

Nuances matter here as well. For one, practice benefits from choosing a suite of contexts that are representative of the situations the learner will likely face. The feedback that explicitly reflects the models about *why* to do it this way helps, as does facilitate reflection on the models to support decoupling the principle from the immediate circumstance. Another nuance is ensuring that the practice is at an appropriate level of challenge for where the learner is. Practice that is too simple or too complex doesn't achieve learning outcomes of any noticeable benefit.

Coaching, Mentoring, & Informal Learning

In addition to reactivating knowledge in practice situations, learners are likely to have live opportunities to perform. Feedback from these also accelerates learning. We've discussed self-evaluation, but now we're talking about having others in the loop. Feedback that is domain-specific, and specifically targeted to the domain should precede feedback that asks the learners to self-improve.

Learners, as they progress beyond novices, need different support. Coaching that moves from domain-specific to generic is one approach that has demonstrated value. Another is where learners start learning with and from each other. Having a community where learners can interact, and share their progress and challenges, can be beneficial in the right environment. Similarly, having resources for personalized advancement for learners who've developed the necessary foundation can make sense. Here, having resources in any form of media that are curated to be relevant and useful continues the development.

Conscious decisions about how the learner will be supported beyond the event should be part of the learning journey that's developed. While creating an effective event is a necessary component, it's not sufficient. For learning goals that are complex, urgent, or infrequent in time, more events may be necessary, so too extended follow-up can be useful and necessary. For instance, in the aviation industry – where emergency procedures are complex in the multiple elements involved, urgent in that people can die if not successfully implemented, and infrequent in that you hope *never* to see them – ongoing practice is diverse, rich, and continual.

Development of skills is an option but needs to be done right to be effective. In addition to appropriate learning design and follow-on, it should include any performance support as well. There are processes and practices to assist, and tools to handle some of the details as well. We know what it takes, so there's little excuse to not do it right.

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Deep Dive: New Managers

An almost ubiquitous phenomenon is that the top employees are promoted to managers. They usually have demonstrable expertise in the job, as a basis for their choice. However, they're almost always novices when it comes to management. The scale of this need is staggering when you consider the number of front-line workers being supervised in their jobs. Thus, new manager training is an ongoing need. Thus, there's a skilling need around new managers.

Challenges

Transitioning to a management role is a pivotal moment in any professional's career. However, many new managers struggle with skill gaps, time constraints, and the pressures of leading a team effectively, resulting in high turnover rates and poor team performance, costing an organization both time and money.

To address skill gaps, you need to focus. Many new managers lack critical leadership and people management skills, especially if they are first-time managers. Targeted custom training programs can help build these essential capabilities, if those gaps are identified with enough specificity.

Finding time to address learning on top of regular tasks is another challenge. Demanding roles often leave little room for traditional training. Interactive, on-demand eLearning solutions can fit into any such schedule. A blended approach, as was taken with a client software company repurposing a face-to-face approach, yielded improved morale of leaders and their employees.

A focus also needs to be on consistency and quality in applying learning science. Inconsistent training leads to varied management qualities. Custom training programs ensure every manager receives the same high-quality training without any variances. A systematic approach is necessary.

Constraints

However, these skills haven't necessarily been well addressed, in particular in comparison to leadership. Much has been written about, and investments made in leadership. Leadership development is big business. Yet, it's also problematic, with a focus on generalities and mistaken bases, as Stanford business professor Jeffrey Pfeffer made note of in his book, *Leadership BS.* So, first, a barrier is in finding good definitions of necessary management skills.

Second, leadership development tends to be done in person, even individually. This doesn't scale. Finding a way to develop these managers in large quantities suggests a less-than-individual approach.

eLearning is a plausible mechanism, but then a crisp definition of the necessary skills is needed, as well as an appropriate use of pedagogy. Finally, a mechanism to support continual development is also desirable.

The good news is that, despite the advances in technology, most management skills aren't substantially changing. A slow recognition that management is now as much about development – coaching – as well as handling administrative details, isn't a major shift. Even preparing individuals better for the coming experience can ensure that all start on a level basis, as was found with a client global clothing company.

New Tools

We do have new tools to assist us here. We have had tools that allow us to deliver eLearning, but now we have more. Reactivation, coaching, and more are all able to be facilitated at scale. Thus, the focus shifts to designing the experience first and then delivering the elements.

Platforms are here or on the horizon which allow us to extend the learning experience. We can reactivate relevant knowledge over time, as learning science tells us we should. We can spark reflection, provide practice, and check on progress.

We can also support coaching and mentoring. Learners can be connected to internal or external resources to support development. Having people in the loop is more flexible than canned responses.

More tools are on the horizon. While generative artificial intelligence is still being explored, it's plausible that some of the interactions will be system-generated, not just canned or with people. However, such solutions will likely need the available mechanisms to provide constraints to keep the conversations focused.

Success: Scalable Process

Ultimately, what works for management training is scalable and extended development across a set of skills. Those skills need to be developed to a level where they can be identified, targeted, and assessed. Some will likely be generic, but others will be specific to the organization and its people.

Recognizing that development is a process, not an event, is a critical element. Developing new skills takes time. Acknowledging and accommodating the need for ongoing support and improvement is an important step to success.

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Deep Dive: Sales

Sales skills continue to be in demand, but organizations have to be more agile about adapting to a changing landscape. Thus, skilling for sales becomes critical as a success factor in organizations. How do you meet these needs?

Changing Landscape

The old approaches to sales are changing. The pandemic raised challenges of meeting face-to-face, and technological changes have added to the situation. Further, customers now empowered with access to the internet are more knowledgeable and likely to challenge any claims. Add in the ongoing evolutions in sales approaches, and increasing shifts in corporate strategy to continue to adapt, and it's easy to see that the sales landscape is no longer static.

Our own experience has shown that expectations are different. The old practice of a salesperson on a regular trek around possible customers has changed. Organizations are being updated to account for new behavioral research in marketing, technology opportunities in operations and products, and business models.

Barriers

Yet, there remain barriers to success. For one, as Jim Mikula stated in his book *Sales Training,* "Salespeople are active; they want results fast; and when it comes to training, they want the answers to the challenges. That's the good news. The bad news is that these qualities can hinder adult learning."

As stated earlier, learning new skills takes time, a precious commodity. Plus, the incentive packages typically used with sales mean that sales folks aren't keen on devoting time to learning.

There's another factor: are you retraining your existing folks, or bringing on new staff? The existing folks may well have familiarity with the culture, but shifting business strategies impact sales approaches. Further, cultural changes are occurring as well, and those need to be accounted for.

New folks, on the other hand, may bring preexisting sales skills, that need refining or revisiting, as well as introducing them to the organization's products and/or services.

Overall, there are a lot of challenges to face.

Success: Full Court Press

To succeed, multiple elements need to be aligned. You need onboarding for new folks to address culture, knowledge, and skills. You need reactivation of that knowledge over time. And, as things change, you need more learning to address new products or services, and updates to the selling process.

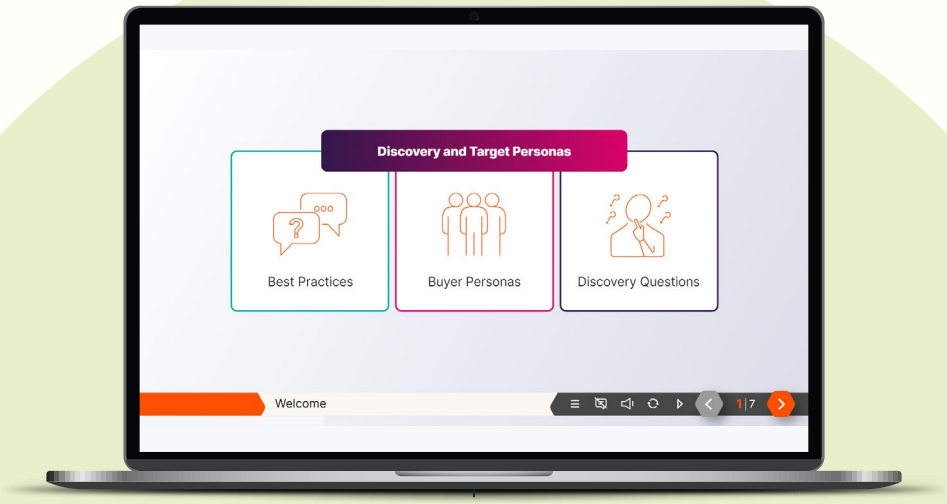
For onboarding, it's more than just knowledge. Learners need to be introduced to the organizational culture (in reality, not lip service) in ways that help them align and understand what that means for behavior. To facilitate that, they need help with developing a network of peers, mentors, and experts who can help them get established, answer questions, and become successful. They need early support to grow professionally. This latter shouldn't be left to chance, but there should be an explicit development path over time. This means being strategic about providing guidance.

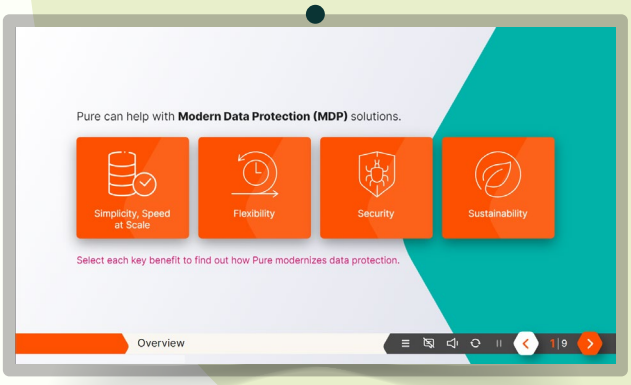
A second component is continual development. This means several things. For one, it means having integrated communities around the sales task. That could mean being a member of the product or service community that includes those that develop and support as well as sell. That's also a community of those selling this product/service, and other products/services, sharing best principles and lessons learned.

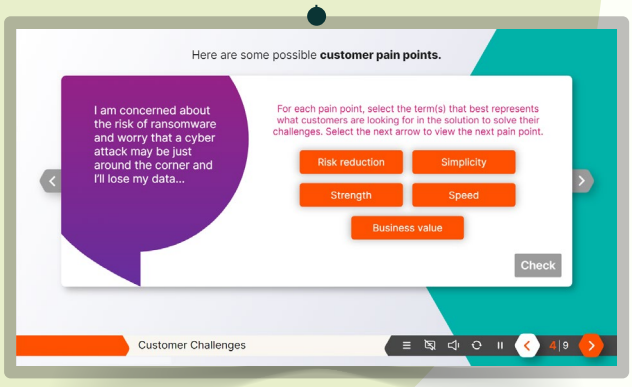
There's also continual development through training. Here, you're advancing their knowledge of new products or the selling process. In one instance, for example, Upside Learning worked with a global tech company to create selling scenarios for different customers. The outcome was a 92% learner success rate in accreditation for selling the offering.

Both these efforts need to be concrete about specific skills. Vague generalities about 'customer focus', for instance, need to be unpacked into more detail. Talking about understanding the customer upfront through research, finding specific concerns through conversations, and matching solutions to needs are the types of more detail needed.

Skilling affects sales as much as any other domain. Doing it right means staying on top of new developments, assessing skills, and continually developing individuals. It's true in general, and specifically in this area.







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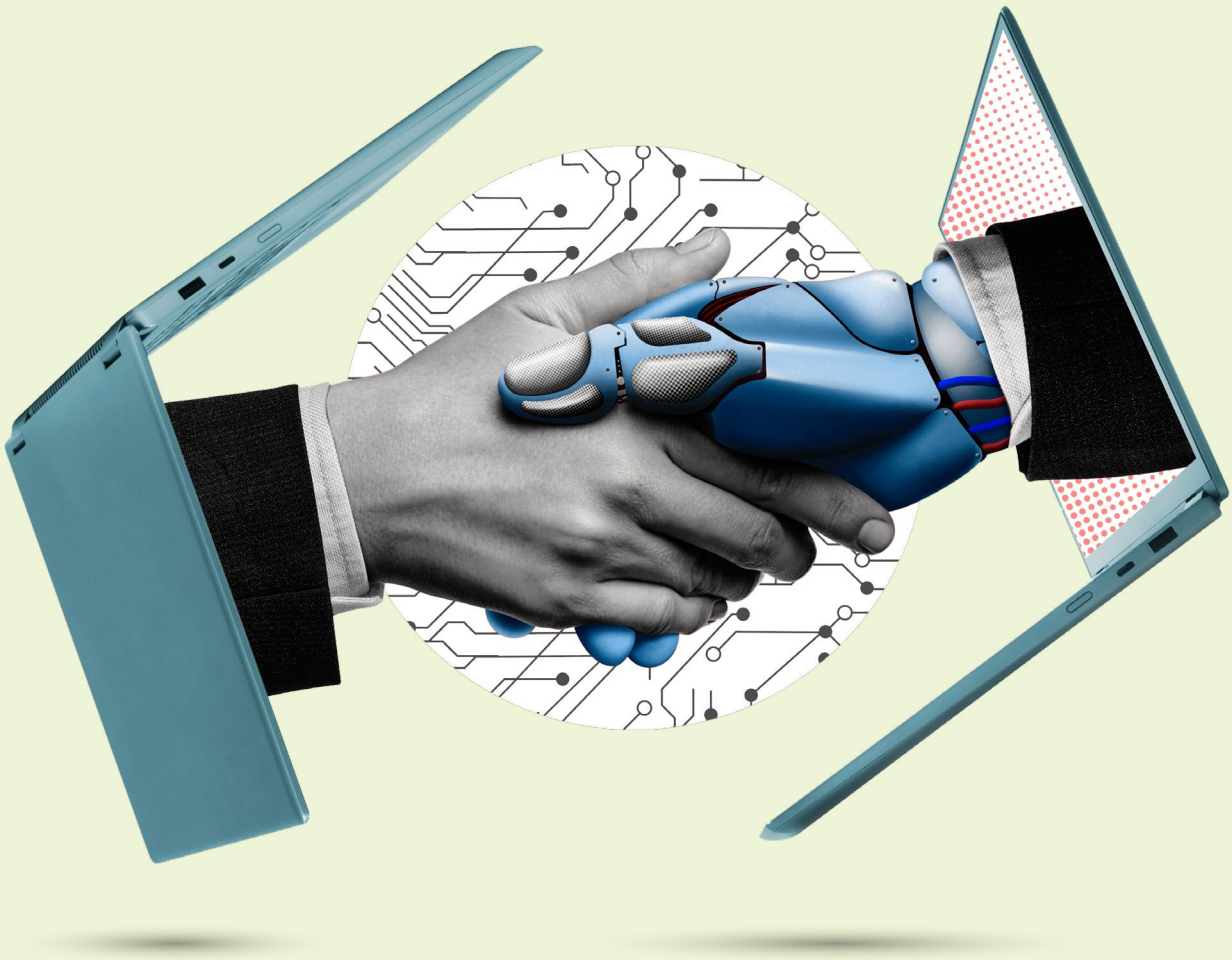
Deep Dive: New Tech

That things are changing faster is by now a cliché. The rise of generative artificial intelligence (Gen AI) is the poster child for this development: at the time of writing, Open AI has been around for less than 2 years but has changed the competitive landscape for organizational performance.

Some changes are predictable, others not. What matters is being prepared for the former, and being able to adapt to the latter. That requires some skills on behalf of the learning and development (L&D) team that may not currently be extant.



Changing Landscape

A given is that the rate of change is increasing. This is true not just for AI, but in many areas. Battery technology, for instance, is rapidly advancing, as are renewable technologies overall. So, too for chemical advances and many if not most technology areas.

That rate of change provides several outcomes. For one, it means that staying on top of a technology being used for products or services will need to be continually tracked and appropriate new skills sourced.

It also provides for the unexpected. Just as the rapid rate of capability growth in Gen AI was unprecedented, other such revolutions are likely. Competitive pressures mean there are advantages to not announcing new capabilities until they're ready for market. When technologies then emerge, there's little time to take advantage.

Barriers

The rate of change also means that the source of people may be limited, and acquisition may be hard. As a consequence, there's pressure on internal development. When you can't buy what you need, you'll have to build.

Information about the new capabilities may be hard to find. Inferences may be necessary from limited sources. Reverse engineering may also be a necessity.

New technologies are likely, increasingly to require teams with complementary capabilities. As new technologies typically leverage interactions, those interactions require skills in different domains as well as their intersection.

Success: Track and Experiment

First, success is about tracking new developments in underlying areas. The analysts in key fields of the organization should be continually monitored. Internally, there's a need to listen to those who are paying attention.

Tracking what others are saying needs to be coupled with controlled experimentation. Trying out new things is a necessity, and innovation is the key. The organizational key is to accept a moderate risk of mistakes, at least intelligent failure, as Amy Edmonson lets us know in her book *Right Kind of Wrong*. Testing out possibilities through prototypes and pilots is a valuable way to learn lessons that can be shared internally, but also identify skills or gaps in being able to execute or interpret these outcomes.

Part of at least the initial skill development comes from participating in such endeavors. Learnings from those experiments should be shared, but so should any indications of the skills needed and how to determine them.

Similarly, those involved in experimentation should be regularly surveyed to discern what skills they anticipate becoming important. While not definitive, even indicative information is useful in being prepared.

For the unexpected, there is a two-pronged approach. One is to immediately look to those who do know, and find out what they suggest are key skills. Another is to do more *ad hoc* experimentation than the planned ones, just to gather information as a preliminary source of skill information.

Innovation can come internally from these experiments. It can be difficult, particularly if risk is avoided and lessons can't be shared, but increasingly the barriers are recognized and the culture needed is identifiable. Change is hard, but is particularly important, going forward.

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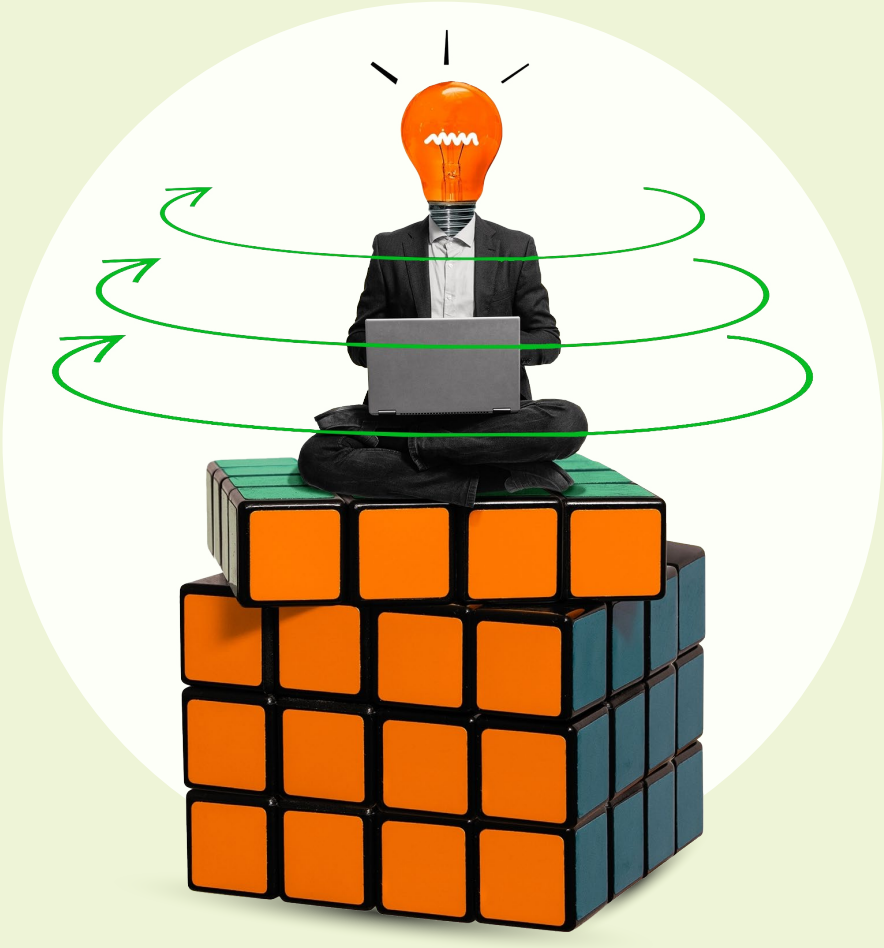
Skilling Strategically

The case for a strategic focus on skilling has been made. In short, as things go faster, the ability to anticipate and deliver on skill needs will be a necessary differentiator for organizations. Whether organizations reorganize to better align with this perspective, or implement through existing structures, there needs to be a concerted effort to address these needs.

Two things are clear. One is that the focus has to turn to being able to do. It's no longer sufficient to talk about knowledge. It's also not sufficient to respond to requests. Increasingly organizations need to be proactive.

That also implies that this isn't a singular effort. Skilling has to become a process, not a product. Ongoing efforts to look ahead for upcoming needs as well as organizational shifts need to complement a continuing focus on what's needed for the organization's current directions and ensure that capability is being adequately addressed.



Performance Focus

As we've said elsewhere the focus can no longer be on 'knowing'. That we don't learn from new information is increasingly recognized. In general, new information is considered a necessary, but not a sufficient, condition for change.

A focus on doing needs to become primary. This includes being specific about what's needed, and evaluating whether it's being met. Once skills are identified, the assessment needs to be specific, and fit to need. The strategic shift here includes recognizing the need for impact and the associated need for performance. Then, the shift is to align to it; defining skills in measurable terms and assessing against them.

Recruitment techniques are increasingly focused on actual abilities to do the necessary tasks. This needs to be complemented in the development phase. Training should leverage the implications of research on learning and achieve actual new capabilities. A dependence on whether people attended, and liked, a training event is not an indication that abilities have been acquired. There needs to be a demonstration that they've been acquired, are being applied in the workplace, and are yielding the necessary outcomes.

This includes seemingly ephemeral competencies like innovation. Such areas need to be broken down into concrete components, and these need to be developed.

Continual Process

The second element of skilling as a strategy is to recognize that it's not a project. The reality of increasing change means an escalating need to continually adapt. New directions and new external developments will continue to emerge, and an idiosyncratic approach will no longer be adequate. At some point, a series of projects becomes a process, and being proactive is the call.

Organizations need to establish a process to do two things on an ongoing basis. One is to track the strategic directions chosen by the organization. Simultaneously, a survey of changes anticipated, and recognition of unanticipated but extant or developing ones, also needs to happen.

The output of this process of developing a slate of necessary skills needs to be complemented by an ongoing assessment of capabilities aligned with these skills. Here, putting in place practices that address them on an ongoing basis makes sense.

Having ongoing identification and assessments of skills, to complement the development capability, will be the strategic need going forward.

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Start Skilling

So how do you move forward? How do you start skilling? Recognition, of course, is the first part, but taking action is a second.

Skilling, as a perturbation to the status quo, needs to be treated like any organizational change. First, a vision needs to be created and shared. This should be presented as a choice of acting or not, so that everyone understands the need for the initiative. Concrete actions need to be identified and executed against. Successes should be shared and effort rewarded, while barriers need to be identified and eliminated.

Need It

Learning & development (L&D) can be the catalyst or recipient of this change. Or, L&D can be another victim as the organization goes under. Whether L&D is a driver or participant, it should not be passive or resistant. This is an opportunity for L&D to become more strategic. As a key component of meeting organizational needs current and future, it's a more desirable position than a passive deliverer of requested services. Acquiring actual needs and demonstrating development is a step towards a data-driven contribution to organizational success.

We've made the principled case throughout. We've also talked about specific domains. These are designed to be the ammunition you need to move your organization forward. Which doesn't mean it's easy, or even that you're ready and willing to make the change. Consider what it might mean within L&D or your business unit, and that it may make sense to start internally.

Do It

The first part of taking action is ensuring that the needs are shared. The argument should be obvious, but complacency is to be expected. Be prepared with a full suite of arguments, so that the appropriate one can be marshaled as needed. Be prepared with principled arguments, captivating examples as stories, and data. For instance, the rapid rise of Generative AI should be on everyone's mind.

Recognize that even if there's buy-in, there'll be pushback and back-sliding. Peter de Jager has suggested that having a group to address the expected problems be complemented by one that is designed to handle the unexpected problems that will emerge. This is about managing the change to the steady-state ongoing process of skilling.

Strategic partnerships may make sense. The talent function, in this case, is an obvious area for collaboration. This may continue to fall under Human Resources or be established as its own area, with budget and reporting responsibilities, potentially to the C-suite. L&D has a role, even if it's not to lead.

In the long term, skilling will be a feature of successful organizations. The opportunity here is to comprehend and deliver on that direction, alone or in conjunction with other organizational areas. Reality is driving, but we can decide to be along for the ride, or be sitting on the side of the road being passed by. Where do you want to sit?

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Clark Quinn, Ph.D. *is an internationally renowned learning consultant, speaker, and author. He has been involved in the design, development, and evaluation of a wide variety of educational technology for over 40 years. He integrates creativity, cognitive science, and technology to develop award-winning learning and performance support systems. Clark has authored multiple books on learning and also holds the honor of being awarded as the eLearning Guild's first Guild Master in 2012.*

About

Upside Learning Solutions, a division of Mitr Learning & Media, is a two-decade-old, multi-award-winning provider of learning solutions. Specializing in learning consulting, developing science-backed custom training programs, and offering top-tier learning staff augmentation services, Upside Learning helps L&D leaders achieve impactful business results. Over the years, Upside Learning has won more than 140 global accolades (including the likes of Brandon Hall Group and Deloitte amongst other noteworthy names).

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