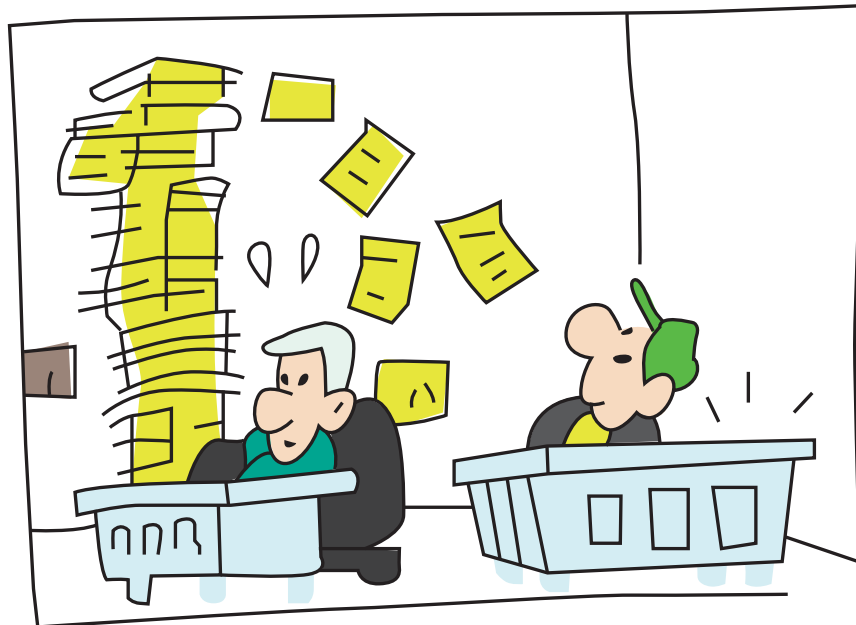


# Workflow Learning

## “FIGURE IT OUT!”

How people truly learn  
in the flow of work



Vignettes Learning

How do people truly learn in the flow of work? The stories here illustrate why it is important to encourage workers to “figure it out” when implementing and applying workflow learning.

## A revealing question

In my consulting profession, I work with many clients and other Learning and Development (L&D) professionals. I frequently ask them how would workers produce results if there were no training programs.

What I consistently hear is that workers would:

- Do trial and error
- Check with each other
- Refer to past experience
- Review logs, records, and documentation
- Check suppliers and other sources

Some people have these misgivings about these approaches, arguing that:

- Workers won't know the correct answers.
- Work is done inconsistently.
- There are higher risks.
- There will be no quality control.

However, the consensus is that the workers will figure it out.

## What does “figure it out” mean?

Curious about what it means when workers are expected to figure things out, I asked workers, “If you have a broken part or a problem at work, what do you do?”

The “Broken Screw” story illustrates this idea.

*A technician, having a problem with her equipment, scans the manual again to see if she's doing the procedure correctly. She thinks, “I'm using the correct screw, but it won't fit.*

*What am I doing wrong?”*

*She tries to insert it again, but to no avail. She checks the supplier's website for more updated information about the equipment but there was none. Her last resort is to ask a senior technician about it.*

*He replies, “You have to heat it up a bit. Although this is supposed to be the right screw, it does not fit.”*



Ray Jimenez, Ph.D.  
Workflow Learning Author

“How would workers produce results if there were no training programs? The consensus is that they'll figure it out.”

## Broken Screw Story



Ray Jimenez, Ph.D. 2019  
Workflow Learning (2019)

**Figure 1: People check the manual, check equipment, call the supplier, and ask others for help when they encounter a "broken screw."**

My initial reaction was that, if workers could figure out the solution, why focus our effort on producing training content? Shouldn't we help workers master the art of "figuring it out" instead? Now questioning my own focus as an L&D professional, I pursued these questions with clients, workshop participants, other L&D professionals, and operations people.

## Three companies; one common denominator

A few years ago, I was creating troubleshooting and problem-solving courses for one of the world's largest fiber optics cable manufacturing operations. I wondered why these highly educated engineers and technicians needed help solving problems.

- The client provided insight: "The operation is pretty automated. However, we discovered that when unexpected deviations caused problems, workers were slow to think through the issues and find solutions. Hence, wastage increased. Bottlenecks happened. Production slumped. We wanted them to be able to address the unexpected."

In an oil refinery project, the VP for operations raised a challenge: What would it take for our people to reduce errors by 1 percent?

**"If workers could figure out the solution, why focus our effort on producing training content? Shouldn't we help workers master the art of "figuring it out" instead?"**

- The VP wondered why many workers don't go beyond the obvious. Pumps usually go through regular checks and function well. But they may develop minute and invisible cracks, which are unnoticeable during observations and instrument testing. These grow into costly and time-consuming problems. Even so, workers seem content to rely on routine records and visual inspections. They don't anticipate and prevent hard-to-find errors and problems.

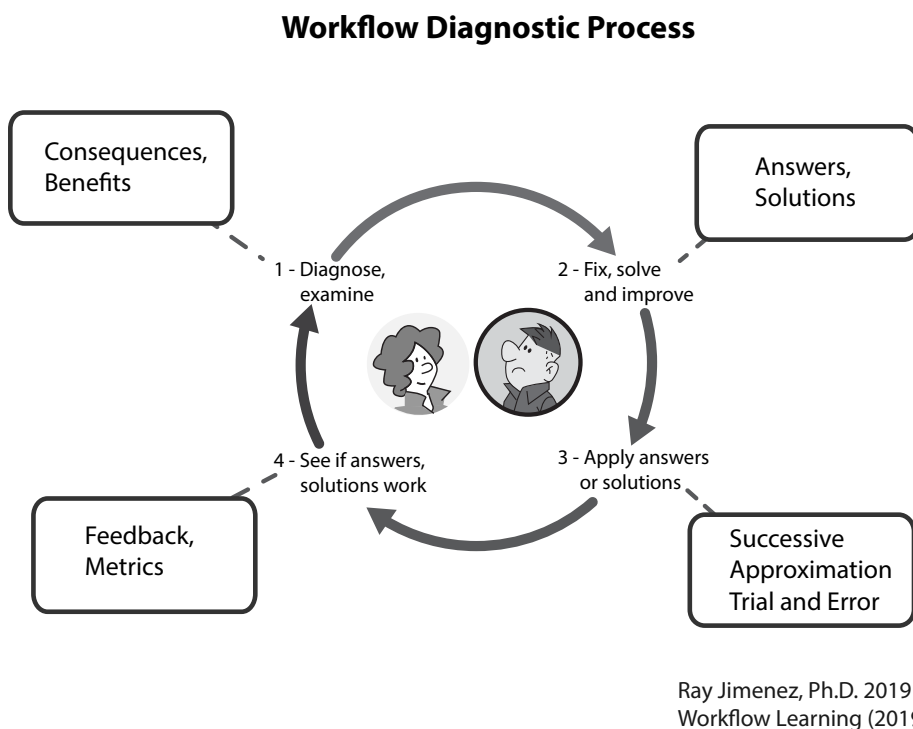
I worked with an executive to retool and add robotics to the manufacturing process for a truck chassis.

- The executive told me that this expanded their production capacities. However, indispensable as robotics are, he still needed people to be able to think through issues and make decisions during breakdowns.

The common denominator: Employees need to be able to anticipate uncommon events and find solutions.

## A framework for understanding: The Workflow Diagnostic Process

The Workflow Diagnostic Process evolved from these experiences of working with different companies. This framework helps me make sense of workers' ability to "figure it out." Figure 2 summarizes the process.



**"The Workflow Diagnostic Process is a continuous cycle of diagnosing problems, finding and testing solutions, and gathering feedback on those solutions."**

**Figure 2: The Workflow Diagnostic Process is a continuous cycle of diagnosing problems, finding and testing solutions, and gathering feedback on those solutions.**

In the workflow, workers:

1. Constantly diagnose, fix, solve, and improve their work. The diagnostic process is the act of “figuring it out.”
2. Seek answers through experience sharing; examining logs, records, and databases; trying software solutions; and consulting suppliers.
3. Experiment; use trial and error.
4. Use feedback from data, analytics, or observable indications to check whether their approach worked.

The Workflow Diagnostic Process happens in seconds and is constantly repeating. When workers fix, solve, and improve issues, they directly impact work outcomes. Therefore, workflow learning is learning at work that directly impacts outcomes.

The challenge that we face in L&D is that many of our training programs are far removed from the realities of work. We must bring our programs closer and find new ways to help workers learn while doing their work. This means we need to embrace and nurture their ability to “figure it out” using the Workflow Diagnostic Process.

## Turning concepts into processes

The next big question was how to convert this insight into a process that would help L&D clients and operations leaders.

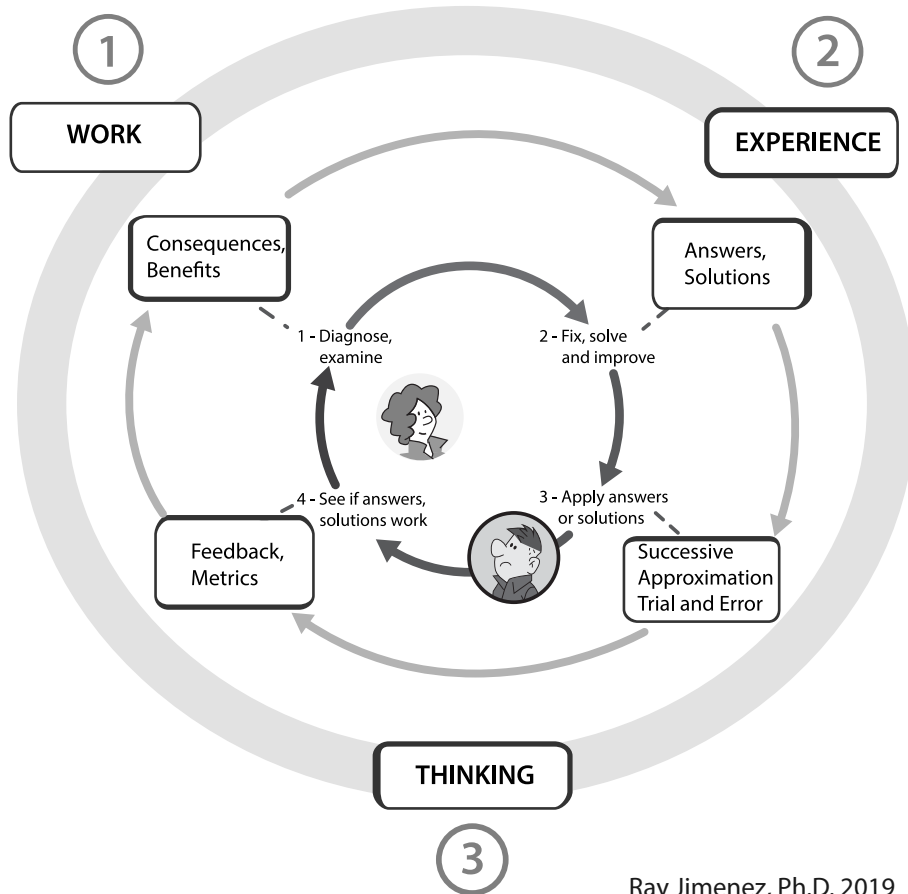
Experience-sharing between workers, on its own, is insufficient.

The quality of outcomes and the pace of problem-solving accelerate when workers go through a thinking process. This improves their ability to deal with the unknown and unexpected. Asking reflective questions, such as “What would happen if you tried it this way?” develops deeper thinking skills in workers.

With this in mind, I added work, experience, and thinking into the Workflow Diagnostic Process.

**“Workflow learning is learning at work that directly impacts outcomes.”**

## Workflow Diagnostic Process



Ray Jimenez, Ph.D. 2019  
Workflow Learning (2019)

**“The quality of outcomes and the pace of problem-solving accelerate when workers go through a thinking process.”**

**Figure 3: Adding work, experience, and thinking into the diagnostic process brings learning closer to work.**

1. Workflow learning starts with work. Workers identify the real work issues and situations they want to fix, solve, or improve—they “own” the issues and solutions. To bring learning closer to work, this is essential.
2. Workflow learning promotes experience-sharing—the fastest, cheapest, and most reliable way to find answers and solutions.
3. Workflow learning encourages thinking processes that elevate experience from open-ended conversations into guided and directed inquiries and logical solutions. Critical thinking helps remove bias, encourages workers to think outside of their silos, and promotes deeper learning.

## Workflow learning helps workers “figure it out”

Workflow learning supports and assists workers while they are in the process of “figuring it out.” This approach compels us to think beyond traditional approaches and instruction so that we achieve our main mission: Through Work We Learn.

David Scott, a learning leader at the NASA Huntsville Operations Support Center (HOSC) in Alabama, recently summed it up: “When workers are ‘figuring it out’—fixing, solving, or improving on a work problem, sharing experiences, and using thinking tools—they are learning without knowing they are learning.”

## Resources

[A New Paradigm for Corporate Learning: Learning in the Flow of Work](#) by Josh Bersin  
[Mastering the Learning Pyramid](#) by John Hagel  
[Prediction: Learning will go to where work happens](#) by Julie Hiipakka  
[Work-Based Learning: Bridging Knowledge and Action in the Workplace](#) by Joseph Raelin

# Situation Expert™

Workflow Learning Platform



## Through Work, We Learn™

There's a lot of expert opinions that suggest training and learning practices are undergoing a dramatic change due to the digitalization of businesses.

- *"While we often think of training as programs or courses, a new paradigm has arrived, one I call "Learning in the Flow of Work." Josh Bersin, July 8, 2018*
- *"...moving learning away from events and into everyday work is one of the hottest topics in our industry right now." Bob Mosher, CLO Magazine, August 27, 2018*
- *"...workers need to go beyond tasks learning to capacities in thinking skills..." John Hagel, Harvard Business Review, June 19, 2009*

At the heart of the new thinking is to bring learning closer to work. The challenge is that many learning platforms are based on the "instruction" and "job skills" models. They are inflexible and slow to respond to the demands of work. These models are inadequate in facing the new, rapid, fast changing, uncertain and volatile work situations. Work must be the focal point of learning. To respond to this challenge, Vignettes Learning introduces Situation Expert, a new Workflow Learning Platform.

**Vignettes Learning** Situation Expert Workflow Learning Platform is a service of Vignettes Learning



# Situation Expert™

Workflow Learning Platform



# Continuous learning by fixing, solving and improving work situations. Be an expert fast.

- 1 Be a Situation Expert While at Work**  
Accelerate and boost skills and results
- 2 With Micro Knowledge**  
Small steps that truly help learners
- 3 Through Work, We Learn**  
Build expertise through real-world situations
- 4 Quick and Easy Ways**  
Low effort and fast access to solutions
- 5 Help Workers Learn**  
Faster and easier learning

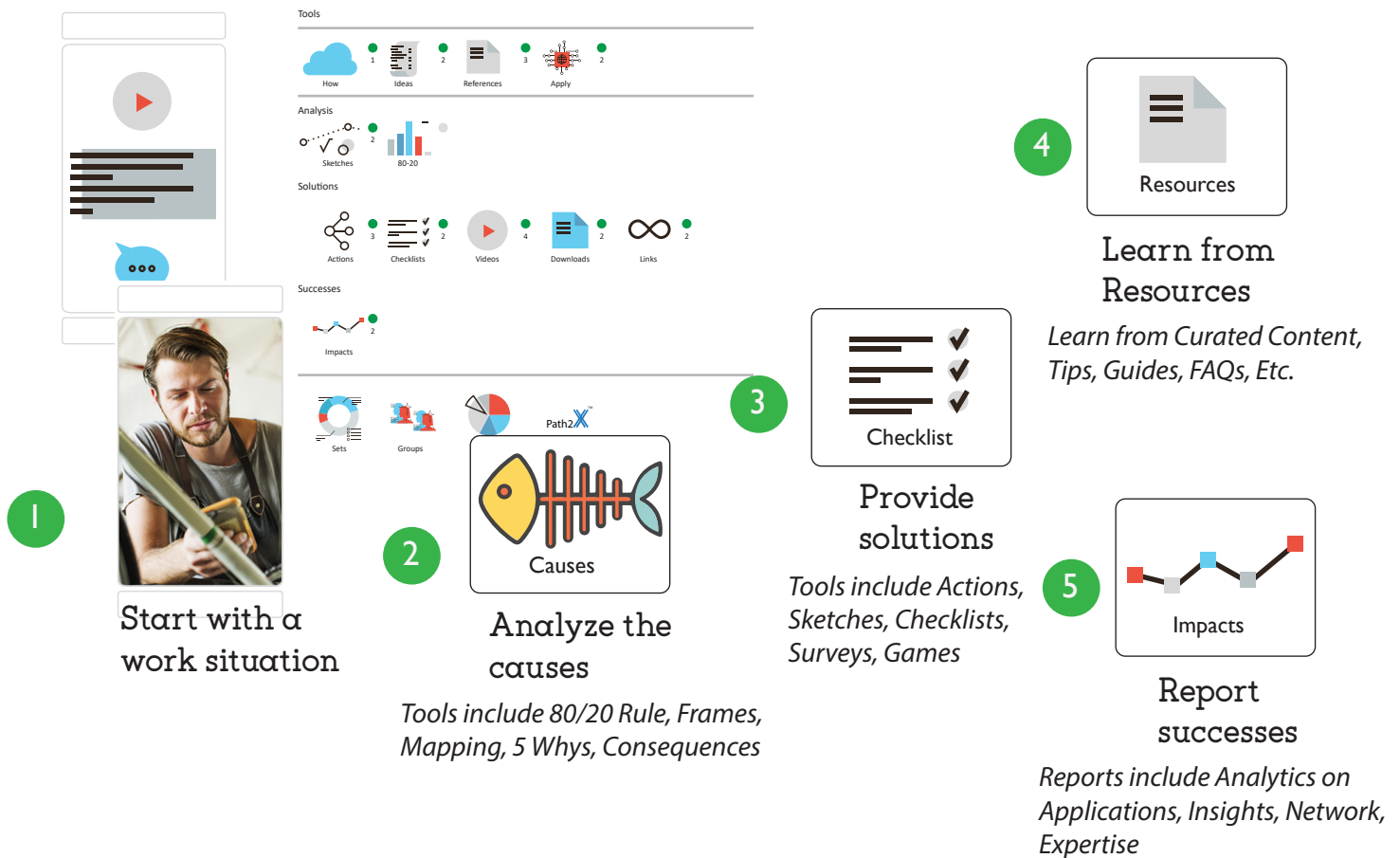
# Situation Expert™

## Workflow Learning Platform



## The Process

The process starts with identifying a situation. Your learners can then dig deeper and analyze the causes using a variety of tools. They can also provide solutions or search ideas in experience and knowledge resources. Finally, your learners can post their successes.



Situation Expert is a Workflow Learning Platform (WLP) that provides learners both surface and deep learning experiences. It helps learners deal with work situations by creative critical thinking, decision making, analysis, solutions, pattern seeking, and experience sharing. Organizations can create and customize their own private accounts. Situation Expert is a cloud SAAS (Software-as-a-Service).

# Situation Expert™



Workflow Learning Platform

## How and where to use Situation Expert™



### Benefits of being a Facilitator

- Use your own workplace situation
- Introduce background information
- Engage learners with over 20 tools, etc.
- Schedule situations once, daily, weekly
- Invite members or assign them to groups
- Review reports and analytics

### Benefits of being a Learner

- Work and learn from situations
- Share analysis, solutions and successes
- Subscribe to situations
- See which Tools you've accessed
- Track your progress on Path to Expertise (Path2X)
- Connect and learn from other groups

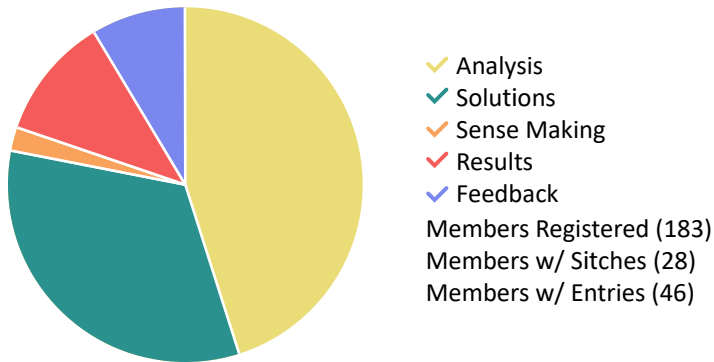
# Situation Expert™

## Workflow Learning Platform

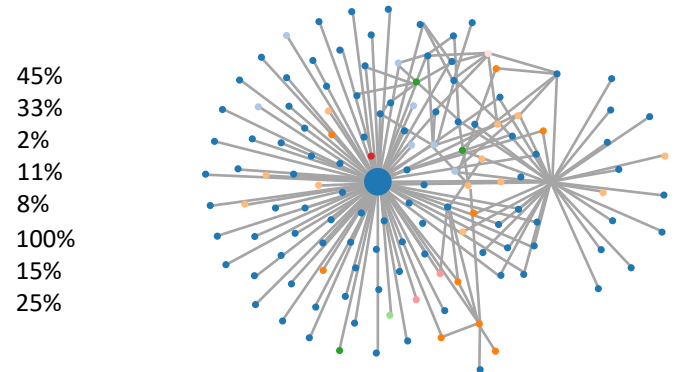


Situation Expert helps learners, facilitators and leaders focus on what matters while learning at work.

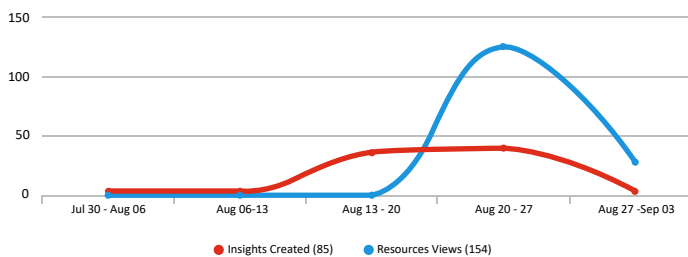
Intensity of Insights



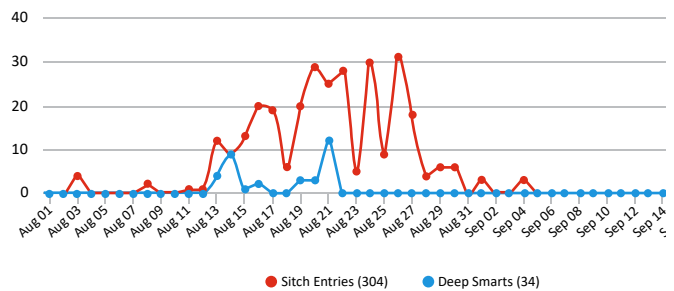
Strength of Network



Intensity of Applications



Depth of Deep Smart Thinking



Impacts of Learning at Work



Learner's Path to Expertise

EXPERTISE	ACTIVITIES	POINTS
tractor (1)	1 36 33 29 13 24%	520
food (1)	1 12 14 7 3 8%	160
Safety (1)	1 12 14 7 3 8%	160
Technologies (1)	1 12 9 4 2 6%	115
Violence (1)	1 11 8 3 2 5%	95
PIPEDA (1)	1 5 7 3 2 4%	85
Personal Information (1)	1 5 7 3 2 4%	85

Vignettes Learning Situation Expert Workflow Learning Platform is a service of Vignettes Learning

Through Work, We Learn Try it today! [www.SituationExpert.com](http://www.SituationExpert.com)

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## Capabilities and Services

### Benefits from Situation Expert

#### ● How can you benefit?

You can post a Sitch and get help from others on issues you need answers, solutions or insights. You can invite others to assist you in your Sitch. You can review and publish your progress through the Path to Expertise tool.

#### ● What are the benefits to team members?

When someone creates or replies to Sitches, your team develops a pool of valuable answers and insights on the most common issues your team encounters at work. You learn and build expertise by exchanging experiences with your team members.

#### ● What are the benefits to your company?

Your company will have a way of helping everyone learn, contribute, and build their expertise. Situation Expert helps your company save costs, increase the speed of solutions, and improve the company results.

#### ● What are the benefits to leaders, learning professionals or knowledge experts?

With your leadership, you help your team members and the company accelerate expertise, and skill building. Situation Expert is a way to help teams share actions and knowledge to fix, solve, and improve your company's pressing issues and problems. Situation Expert is a solution to problems of talent loss through attrition or turnover. It helps in retaining company wisdom and best practices and improving results and performance by immediate sharing of issues, problems, opportunities, and solutions.

### Features of Situation Expert

#### WORK

- **Sitches (Situation) Actions** - Sitches are situations, jams, issues, errors, gaps, troubles, stoppages, crisis, and many others to fix and solve. They are also opportunities to improve, grow, expand, and introduce better, faster and cheaper ways to get the desired results.
- **Workflows** - A presentation of visual workflow, scheduler or timing of Sitches, events or learning situation.

# Situation Expert™

## Workflow Learning Platform



- **Dynamic Impacts Survey** - Instant, short, random, small and flexible surveys to collect, store and process workers' and learners' needs based on gaps in work demands. The data is compared with the list of resources, and results are presented to the workers and learners for quick workflow learning.
- **Surface & Deep Learning** - Tools are micro-interactive "apps" that aid in the "Thinking Through" process when dealing with Sitches (Situations) They enable learners and workers to analyze, create solutions, find patterns, report impacts, and provide learning feedback. The tools include among others: Fishbone Analysis, 80/20 Rules, Gap Analysis, Critical Impacts Study, Mapping, Frames, GroupThink, Pros and Cons, Checklist, Workarounds, What Ifs, Videos, Downloads, Links, and Sense Making.
- **Path to Expertise (P2X)** - In Situation Expert, your Sitches, comments and other activities are tracked. The purpose of Path2X is to show you the areas of your Path to Expertise - Path2X. You'll see your progress and a general idea of your interest areas. You will also see the topics that you worked on and you can directly access the Sitches from the list. Path2X provides you total points. You can sort by Recent, Expertise Type and Points. One valuable feature of your Path2X records is the display and announcement to your teams and company on how you are building your expertise.
- **Insights & Reflections** - A method that allows learners to submit and store micro-insights from their readings and researches in the system's content. The insights are then compiled to show the learners' and workers' Path to Expertise (P2X). The Insights indicate the reflections of the learners' and workers' learning paths.
- **Members Connections** - A method to encourage members to connect, follow and to be followed by peers for the purposes of easy and quick exchanges of experiences, resources, and solutions.
- **Community** - A larger way to organize an open interaction by members in the company to preview, share and access peers and resources for the whole organization.
- **Messaging and Alerts** - In every aspect of the Situation Expert, Messaging and Alerts are in place to help facilitate the exchange of ideas among workers and learners, and help them solve, fix and improve work situations by applying Deep Learning processes.
- **Deep Smarts** - A recognition method where members provide feedback and extend awards to postings and sharing of knowledge that meet the Deep Learning deliberate thinking process.

# Situation Expert™

Workflow Learning Platform



## LEARNING

- **Curation** - Organizing in multiple ways the different content resources and methods to help workers and learners find answers and match the knowledge and information to their Path to Expertise (P2X), interests and need areas.
- **Collaborative Learning** - These are the different micro-features that encourage free flow of conversations among members to exchange ideas and solutions. These include chats, discussions, notes, and private conversations. The social tools are integrated into all aspects of the system.
- **Advanced Groups** - The ability to organize different workers and learners Sitches and Workflows that is unique to a specific department, division, tasks, functions, teams or a specific team of people.
- **Content Creation** - The ability for account owners, administrators and content writers to create micro-lessons and programs. It allows tagging and naming conventions to track all types of content to support the Deep Learning process. Authors can add pages, videos, images, PDFs, documents, and other types of files.
- **Helpdesk** - Account owners can use default help guide information. They can also customize and add their own help and support information.
- **Support** - Account owners can configure their own Support System to receive questions and inquiries, and process and track the issues to ensure that each issue is attended to.

## GROWTH

- **Journals** - It allows members to keep private notes on their discoveries, learnings, and other personal references.
- **Path to Expertise (P2X)** - In Situation Expert, your Sitches, comments and other activities are tracked. The purpose of Path2X is to show you the areas of your Path to Expertise - Path2X. You'll see your progress and a general idea of your interest areas. You will also see the topics that you worked on and you can access directly the Sitches from the list. Path2X provides you total points. You can sort by Recent, Expertise Type and Points. One valuable feature of your

# Situation Expert™

## Workflow Learning Platform



Path2X records is the display and announcement to your teams and company on how you are building your expertise.

- **Analytics / Metrics** - A series of visual reports that captures dynamic data on Path to Expertise, Insights, Deep Learning Progress, Dynamic Impacts Surveys, Connections and Networks, Resources Utilized, Insights, Journals, Deep Smarts, and members progress tracking.
- **XAPI** - The Experience API (or xAPI) is a new specification for learning technology that makes it possible to collect data on the wide range of experiences a member has in Situation Expert. This API captures, in a consistent format, data from a member or group's activities in the different parts of Situation Expert. Account owners also have the option to report and integrate the data and reports in their LRS or tracking system.



## Be Real

Too many training sessions and learning projects are wasted by over emphasizing memorization of content and as a result, application fails. Situation Expert uses work situations and incidents as the focus. Workers apply ideas quickly while having access to a wealth of knowledge.

## Be Useful

Focus on work and learn.  
Reduce learning time.  
Accelerate applications.  
Engage learners with real-life issues.  
Reduce production costs.  
Speed up learning delivery.  
Collect and store experiences for as-need-basis references.

## Be Capable

Software As A Service (SAAS) solution.  
For small and enterprise applications.  
Create your own situations.  
Numerous tools for analysis, solutions and successes. Store, collect and present experiences. Submit and present content. Path to Expertise (Path2X).  
Track results with XAPI and LRS.

# Request for a demo today!

Contact us at  
[www.SituationExpert.com](http://www.SituationExpert.com)