

BEATING THE “FLUFF FACTOR”

USING 5-STEP SIMULATIONS™ TO OVERCOME BARRIERS TO LEARNING RELEVANCE IN WORKPLACE TRAINING AND HIGHER EDUCATION

“This was a lot of fun, and I learned a lot about myself. I have no idea what I’m going to do with this, but I would recommend this course to anyone!”

—Leadership Training Program Learner, 2008

If the quote above from a manager in a corporate leadership training program doesn’t make you nervous, it should. This manager was a highly-paid professional who took a day out of his busy schedule to attend a training workshop. He enjoyed the experience and was very enthusiastic about the program, but could not think of anything to say about how he was going to use what he learned when he returned to his job. The training sponsor paid a lot of money for that manager to attend the program, but it wasn’t relevant enough for the learner to use, so the investment in training was largely wasted. For this learner, it was “fluff”—fun and engaging in the moment, enjoyable, full of insights and “Aha!” moments, a good break from the routine of work, and ultimately irrelevant.

THE STRUGGLE FOR RELEVANCE

There is a constant struggle for relevance in training and education. Workplace learning and performance professionals have known for a long time that they need to provide relevant content and activities for learners. Without relevance, learners cannot produce meaningful outcomes. When the learning is relevant, the learners themselves become the agents of their own transformation. They are energized. They know what to do, and how, and why. When they use what they learn, they get different (and usually better) results. Relevance is one key to learning transfer.

The problem is that making learning relevant is difficult. First off, from a philosophical standpoint, relevance is defined by the learners themselves. It differs from person to person within an audience. The educational and learning theorists who talk about “constructivist” approaches to learning believe that knowledge is not objective, but individually and socially constructed. Much of the available evidence from research into how people learn supports this theory. The knowledge that two people draw from exactly the same course or learning experience will differ with the inputs that each learner brings to the experience. Learning happens within a context, and so the specific time and place, as well as the learner’s current interests, needs, perspectives, and interpretations, will affect what he or she will see as relevant and important. The people that the learner interacts with in the learning

environment and on the job affect what he or she is willing to consider as relevant, too. As a result, relevance is always a variable, moving target.

While relevance from the learner’s point of view is most important to learning transfer, relevance from the provider’s point of view is most important to instructional design. We design courses or activities to meet certain objectives or to produce desired outcomes. Whether these objectives and outcomes are specified with clear, detailed requirements or conveyed in a more general, holistic way, they drive the purposeful design of learning experiences. The designer tries to craft the learning experience in a way that brings the audience and the content together in ways that meet the desired objectives. Most designers usually demonstrate the importance and relevance of the topic as part of the course introduction. Especially well-designed courses include the opportunity for the learners to make the content and learning points relevant to themselves at several points along the way through the experience. The challenge to relevance here is that good instructional design is a complex skill and there are many factors that a designer has to balance in the process of building a course; relevance being only one of many. It takes extra time, effort, and judgment to strike an effective balance between relevance and other factors in training or educational activities.

Relevance in training and education has to be considered from the perspectives of both the learner and the provider. The provider, whether an employer or an educational institution, wants to make sure that the learners are acquiring the knowledge, capabilities, and skills it feels are relevant for the topic. The learners want the experience to be relevant and engaging; a good use of their time and energy. The design and delivery of the learning experience have to account for the needs of both providers and learners. In different ways, both designers and instructors have to bring together these perspectives of relevance, and there are different traps that each might fall into.

TRAPS FOR DESIGNERS AND INSTRUCTORS

There are two main roles in the creation and delivery of learning experiences—the designer and the instructor. In many cases, the same person who designs the course will also be the instructor who delivers it to the learners. In other cases, the two roles are held by different people. In certain situations, such as self-paced e-learning, the designer plays a double role in preparing the instruction for computer-automated delivery. Both designers and instructors can weaken or enhance relevance for the learners.

In essence, instructional design is about creating a planned learning experience and a set of materials to support the plan. For purposes of making learning relevant for learners, the plan itself is where the two biggest traps are for designers. These equally common traps are: 1) making the course too light on relevance, so that the course is full of fun and interesting “fluff,” and 2) going too deep into the content of the topic, mistaking detail for relevance. The first can be engaging and fun, but with little impact. It is too light on relevant content or has too much of a focus on entertainment as the vehicle for keeping the learners’ attention. The second can be full of information, but with little engagement because the amount of detail and lack of context overwhelms the learners. Learners often complain about this kind of course being too hard or boring, even when they can clearly see the relevance. Learners need a balance between “too easy, not relevant” and “too hard to see what’s relevant” for the learning experience to be effective.

Instructors face the same basic challenge, but for different reasons. Whether they are physically present in the classroom or facilitating the course remotely with tools, they guide and shape the experience for the learners.

Learners take instructions and cues from the person teaching the course. The instructor monitors the learners to see whether they are ready for the next segment, or if someone needs additional help or explanation with a difficult concept. The learners get a sense from the instructor about what is really important and what is not from the way that he or she presents information and answers questions. The two traps that instructors fall into are much the same as the ones that create problems for designers: 1) spending too much time on activities that are fun but not highly relevant, or 2) spending too much time on lecture or practice that is more about facts and details than about things that are relevant for the learners. Because the instructor is monitoring the group, it can be easy to fall into an appeal to the lowest common denominator—the least engaged or interested learner—by replacing activities that seem harder or more difficult with something fun and engaging in the moment. A skillful trainer can use almost any learning activity to create a teachable moment. Whether the learning gained in that moment lasts or transfers to the workplace depends highly on its relevance. The flip side is the instructor who is determined to get through the content and stick to the lesson plan, regardless of whether the learners are engaged or not. When the learners are not engaged, the learning is never relevant. The challenge for the instructor is to keep the experience consistently engaging and relevant, with appropriate rising and falling of energy and pacing as the course moves along.

Both designers and instructors face the challenge of providing a relevant, engaging, and helpful experience for the learners. One instructional methodology that can help strike an appropriate balance is the use of simulations.

SIMULATIONS PROVIDE A PATH TO RELEVANCE

“Real life has a lot of rough edges. Simulations are sharp only where necessary.”

—Steve Semler, LearningSim Founder

For most learners, relevance comes from a link between the learning experience and the real world. When the learning experience provides something that is meaningful to the learner, and which prompts action, it is relevant. It isn't enough for the learning to be interesting. It must also offer a way to take action. Learning simulations make a strong link to the real world and put the learners in a very active role. Simulations simplify real-world environments enough for people to practice skills quickly, safely, and in a way that makes the learning points obvious.

Well-designed learning simulations start with a mental model of the real world and reduce its complexity to just the elements needed to achieve the desired learning outcomes. The relevance is built into the learning activity. A simulation presents a coherent challenge to the learner as a problem to solve. The challenge presented by the scenario is the connection to real-world relevance. The design and instructional challenges remain—the simulation can include too much detail or too little, and the detail can have varying amounts of relevance to the challenge. As long as the details support the task, however, learners are likely to find the activity relevant. The ability to cut away unnecessary detail, complexity, and distractions is what makes simulations very effective learning tools. It also makes them fun to use, because the feedback is immediate, learning points are obvious, and the activities can be as relevant and realistic as resources permit.

SIMULATION PRINCIPLES

When simulations are designed as effective learning activities, they need to maintain the link between the learner and the learner’s reality and they need to present the right amount of complexity. There are a few key principles to follow when selecting or designing a learning simulation.

- Make the simulation feel like real work
- Strip away excess complexity and focus on the key dynamic
- Make the situations, choices, and outcomes believable
- Allow choices to influence outcomes
- Keep the rules in the background

Here are more details on each of these principles.

PRINCIPLE 1. MAKE THE SIMULATION FEEL LIKE REAL WORK

Research has shown that when learning activities are similar to the situations in which work is performed, the result is a better transfer of learning. The learners have to make less of a leap between the learning and performance environments, so the new learning fits into familiar mental pathways with less difficulty. The new learning builds upon existing knowledge more easily and efficiently and the relevance of new concepts, information, and skills is easier to grasp.

There is also an emotional component to learning that can help a simulation increase the relevance for the learner. When people get emotionally involved in a simulation, they can draw more impact from the learning experience. When people get caught up in a simulation, it feels like real work. This can only happen, however, if the simulation really does feel like real work.

PRINCIPLE 2. STRIP AWAY EXCESS COMPLEXITY AND FOCUS ON THE KEY DYNAMIC

Learning simulations are simplified versions of the same reality that learners interact with on a daily basis. They capture the essential dynamics of a workplace in a way that allows learners to explore different approaches and experience different outcomes. For people to be able to grasp the learning points, unnecessary details must be removed.

For example, human reactions and employee attitudes may add little value to a financial management simulation. In this case, the designer can take out variables relating to these things. In a management simulation, on the other hand, these may be the key elements of the challenge and the financial elements can be removed. Leave in only what is important to the learning outcome the learners are being asked to reach.

PRINCIPLE 3. MAKE THE SITUATIONS, CHOICES, AND OUTCOMES BELIEVABLE

A simulation is a good way to represent a chain of thought and behavior. First, the simulation presents the learner with a situation and a specific challenge. He or she makes a choice and responds to the challenge. The response creates a natural outcome, which the learner can observe. The simulation allows the instructor to control this chain of events, and to make each link in the chain explicit and obvious to the learner. By reviewing his or her actions, the learner can reflect on what happened as a result of the choice and response made.

If the situations, choices, and outcomes are believable, the learner can pay attention to what happened in the simulation. If any of these seem fake or artificially constrained, the learner may be distracted by this, and may miss or argue about the learning point. Good simulations create the verisimilitude or feeling of reality that helps learners to focus on the important dynamics.

PRINCIPLE 4. ALLOW CHOICES TO INFLUENCE OUTCOMES

The essence of a good simulation is that learners feel like they are in control; they can try anything they wish to overcome the challenge. While this may or may not be true, it is important that learners believe that the choices they make will have an effect on the outcome of the simulation. The embedded rules and structure of the simulation must allow for the learners to achieve different outcomes, depending upon their choices.

The best dynamics for simulations are the ones that successfully show the “natural consequences” of different choices. For example, in a flight simulator, neglecting certain controls will cause the airplane to crash. In a leadership simulation, failure to communicate clearly and convincingly will result in a failure of people to follow the leader's instructions. These are consequences that flow naturally from the choices of the learners. Modeling these natural consequences is a crucial part of designing an effective learning simulation.

PRINCIPLE 5. KEEP THE RULES IN THE BACKGROUND

Every simulation depends upon an embedded set of rules that model the system being simulated. However, the more obvious the rules are, the less believable and engaging the simulation is. If the intent of the simulation is to give people a way to practice making different choices, then the learners should be able to focus on the choices and the situation, and not on the rules.

If learners try to “beat” the simulation, they are focusing on the simulation rules, and not the choices and the situation simulated. Any learning gained from beating the simulation is artificial and has little to do with the purpose of the activity. This makes the simulation a waste of time and money.

On the other hand, when the rules are embedded within the situation and the choices offered in the simulation, people begin to forget that they are in a simulation. They act as they would act in the real situation, and can draw deep insights from the experience.

When simulations follow these five principles, they can be very powerful learning tools that have a very high relevance for learners. Attention to the details suggested by these five principles can make a simulation the most powerful and long lasting learning experience a person ever has.

THE 5-STEP SIMULATION™ METHOD

Effective learning simulations can be very complicated to build and use. In order to make simulations as accessible as possible to trainers, LearningSim created the 5-Step Simulation™ method. Each 5-Step Simulation™ works like this:

Step 1. Set the Stage. This sets up the story, the problem, and the relevance for the learner. There must be enough detail available in this step for the learner to understand the problem, care about it, and see a way to take action.

Step 2. Make a Meaningful Decision. Start with the first logical decision or action the learner would have to take to overcome the challenge. This decision must be important enough for the learner to feel that it is meaningful and relevant, without being too complex. This is the beginning of the story for the learner, and often represents how the learner will approach the situation.

Step 3. Make the Next Meaningful Decision. The next decision should logically follow from the first, and the consequences of the first decision should affect the second one. This is the middle of the story, and is often the most difficult part of the challenge.

Step 4. Make the Closing Meaningful Decision. The final decision should address the remaining actions and consequences that the learner must take to resolve the situation. This is the final action the learner can take to wrap up the loose ends of the story before learning how it all turned out in the end.

Step 5. Reveal the Outcome. Every story deserves a solid ending. The simulation outcome step presents the consequences of the decisions the learner made. This can be done with a simple scorecard, but is much more effective when the instructor can describe a different end-case scenario for each of possible outcomes of the simulation.

The 5-Step Simulation™ method was designed to incorporate all five of the simulation principles and strike an effective balance between complexity and ease-of-use with a step-by-step model. Here is how it works:

- **Make the simulation feel like real work.** The 5-Step Simulation™ method makes the simulation feel like real work by using a work-based story and challenge, and providing the learner with details that they might have available to them in the work setting. One of the business-to-business sales simulations, for example, puts the learner in the role of the lead sales representative of a software development firm. The challenge—sell your firm’s services to the prospective client—is set up realistically in Step 1 with the kind of information that the rep might have going into a warm sales call. Steps 2-4 of the simulation require the learner to understand the client’s needs and communicate them to a technical consultant, write a full sales proposal, and make a sales presentation to win over a panel of client decision makers. In Step 5, the learner finds out whether he or she won the business and receives detailed feedback from the people playing the roles of the client stakeholders.

- **Strip away excess complexity and focus on the key dynamic.** By reducing a complex work challenge to five steps, the method puts a limit on the complexity of the learning activity. It also makes the instructional constraints clear to the designer by providing a template to accelerate the design process. In the B2B sales simulation, the key dynamic revolves around the sales representative’s interaction with a limited number of key internal and external stakeholders in a complex sales process and the deliverables he or she has to provide to each of them to win the business. The learner’s resources are limited to only what he or she needs to analyze the situation, make decisions, and take action to address the tasks of the simulation. All other distractions—everything else that a salesperson in that situation might face—are removed so that the learner can focus on the most relevant aspects of the B2B sales situation.
- **Make the situations, choices, and outcomes believable.** The 5-Step Simulation™ method encourages and supports the designer’s efforts to create a coherent story for the learner. The designer has to do a good job on the needs assessment or task analysis to determine what standard of believability will be required. With that in mind, and with a model to follow, the designer can more easily provide enough detail to represent the “flavor and feel” of the real situation. For the B2B sales simulation, the details provided in Step 1 were adapted from several real complex sales situations. The choices and information available in Steps 2-4 were also modeled closely after real situations. Finally, the Step 5 outcomes were aligned with scoring criteria that represented real internal relationship and power differences within large organizations and how easily different decision makers might be to win over with different sales approaches.
- **Allow choices to influence outcomes.** With the 5-Step Simulation™ method, the learner is in control of the action. The five step model provides the structure and the learner’s actions carry positive or negative consequences forward from step to step. Information that the learner obtained during the B2B sales simulation in Steps 1 and 2 carries forward to other steps and culminates in how the learner handles the sales presentation in Step 4. The results of the learner’s actions are revealed in Step 5 to conclude the story and lead into reflection and transfer activities. This brings the learner out of the simulation scenario and back to real-world relevance to conclude the simulation.
- **Keep the rules in the background.** The structure of the simulation is built into the five steps of the simulation method and the instructions are written into the material that the learner has in each step. This keeps the rules in the background and allows the learner to focus on handling the challenges presented by the simulation. An example of keeping the rules in the background in the B2B sales simulation is the format of the sales proposal. The learner receives a draft proposal from the technical consultant as starting information for Step 3. The task for that step—the meaningful decision is “How do you write a convincing sales proposal?”—is to write up the technical detail into a sales proposal that addresses the needs, wants, and concerns the learner uncovered in conversation with the client in Step 2. How the learner fully addresses those elements of the proposal is important; the format of the proposal is not. To keep the rules in the background, the learner gets a sample proposal format and no special mention is made of format requirements.

The intent of the 5-Step Simulation™ method is to provide an instructional model that makes simulations easier to design and deliver, while offering a high level of relevance and engagement for the learner. The structure of the method conforms to the five key simulation principles and sets a standard for the elements and flow that most often make up good learning simulations.

Professional judgment must still play a major role in the design and delivery process, even with the 5-Step Simulation™ method as a model to follow. The designer must still strike a balance between a light tone and serious one, and between not enough detail and too much. Deciding which aspect of a topic to use as the basis for a simulation and the nature of the three most meaningful decisions to simulate will still be a matter for judgment. Handling details and questions that come up during the simulation skillfully and drawing out the lessons of experience from the learners to enhance relevance still requires the professional skill and judgment of the instructor, regardless of the structure of the simulation.

In the end, beating the “fluff factor” in training and education takes thought and effort. The 5-Step Simulation™ method is a model that makes this process easier. The reward is relevance—a high level of meaningful engagement that helps learners put into action the things they learned in the classroom. When this happens, there is meat to learning that goes far beyond fluff.

ABOUT THE AUTHOR

Steve Semler is the Director of Simulation Design and founder of LearningSim. He is a learning and development leader with 20 years of experience in instructional design and design management. He has a background in learning psychology and significant experience in both education and business environments. He earned his B.S. in Psychology from the University of Wisconsin, his M.S. in Human Resource Management and Development from Chapman University, and is a Ph.D. candidate in Education with emphasis in Human Resource Development at the University of Minnesota. Steve co-developed the Simulation-Enhanced Learning method and Active Leader program with Cori Hill as a consultant at Personnel Decisions International in 1998. He was recruited by The Schwan Food Company in 2001 to help form a corporate university. His work in establishing e-learning, marketing, curriculum, and performance consulting strategies and processes resulted in three corporate university awards in the second year of the university’s operation and Schwan continues to win ASTD BEST learning awards seven years later. He rejoined LearningSim in 2008. In addition to the many Fortune 500 firms for which he has done consulting work, he has work experience with Honeywell, the Minnesota Council for Quality, and the US Army. Contact Steve at ssemler@learningsim.net.

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