

公務出國報告

(出國類別：國際會議)

## 參加美國訓練與發展協會 (ASTD) 2012 年國際年會報告書



服務機關：公務人員保障暨培訓委員會、國家文官學院

姓名職稱：公務人員保障暨培訓委員會主任委員

兼 國 家 文 官 學 院 院 長

蔡璧煌

國 家 文 官 學 院 分 析 師 林維倫

出國地區：美國

出國時間：101 年 5 月 5 日至 12 日

報告日期：101 年 8 月 5 日

## 目錄

壹、前言 .....	3
貳、美國訓練與發展協會（ASTD）介紹 .....	7
參、2012 年 ASTD 國際年會暨會展簡介 .....	8
肆、會議主要內容摘錄 .....	11
伍、研討心得與建議 .....	28
陸、結語 .....	31
柒、參考書目 .....	32
捌、附錄 .....	33

## 壹、前言

國家文官學院於 99 年 3 月 26 日由國家文官培訓所（以下簡稱培訓所）改制成立，除承接原培訓所承辦之公務人員考試錄取人員訓練、晉升官等訓練及行政中立訓練等業務外，更肩負強化我國高階文官培訓、推動公務人員終身學習、公務人員培訓技術與方法的研發及國內外交流合作之重任。為汲取人力資源管理最新發展趨勢及專業知能，並拓展國際視野與交流合作，爰指派人員參加本研討會，以期透過聽取國外相關領域專家、學者之精彩演講，激發創新思維，作為未來規劃各項訓練活動之參考。

### 一、出國目的

#### （一）參加 ASTD 2012 國際年會

1.瞭解及汲取全球人力資源管理發展新趨勢、觀念，進而應用於本學院培訓相關實務。

2.透過國際會議之參與，開拓國際視野，並積極擴展我國國際能見度，以傳承相關培訓理念、實務及技巧。

#### （二）與美國人事管理局(Office of Personnel Management)相關官員洽談

本次與會人員除汲取培訓新知外，另於 ASTD 展覽會場中與參展之美國「聯邦行政研究院」(Federal Executive

Institute, FEI)上級機關「人事管理局」(Office of Personnel Management)計畫執行長(Program Director) Mike Bostwick

及 William Bonds 兩人，洽談未來高階文官海外受訓至美國聯邦行政研究院上課之可行性，並邀請該研究院



長 Suzanne G. Logan 博士擔任本(101)年10月中旬辦理之「2012 公務人力資源發展國際研討會」專題講座。

### (三) 領取 ASTD 參賽獎項

本學院參加 ASTD 所舉辦之 2011 年 ASTD 卓越實踐獎競賽，以「薦任公務人員晉升簡任官等訓練方案」主題參賽，獲得「職涯發展類卓越實踐表揚獎」，該協會於本年 5 月 7 日在其舉行之國際會議中進行頒獎典禮，與會人員將出席頒獎典禮，並準備學院簡介、宣導光碟等文宣，行銷本學院在人力資源培訓之具體作法，以提升學院形象及知名度。

### (四) 參訪科羅拉多州勞工與就業部

本次行程於本年 5 月 10 日安排參訪位於丹佛市之科羅拉多州勞工與就業部，實地瞭解該機構對於勞動就業協助、

提升勞動人力素質，及如何營造良好勞動環境吸引優良企業



進駐以增加就業機會等議題  
進行交流，從中獲得該組織  
如何有效率地提供資訊及工  
具來協助該州企業及勞工永  
保競爭力之策略及方法。

## 二、行程概要

### (一) 會議及參訪行程表

日期	行程內容
5 月 5 日 (六)	搭機前往
5 月 6 日 (日)	抵達美國丹佛
5 月 7 日 (一)	研討會活動及頒獎典禮
5 月 8 日 (二)	研討會活動
5 月 9 日 (三)	研討會活動
5 月 10 日 (四)	參訪科羅拉多州勞工與就業部
5 月 11 日 (五) ~ 5 月 12 日 (六)	搭機返臺

## (二) ASTD 研討會時程表

Time	Thursday - Saturday May 3 - 5	Saturday May 5	Sunday May 6	Monday May 7	Tuesday May 8	Wednesday May 9	Time
7:00 a.m.							7:00 a.m.
7:30 a.m.							7:30 a.m.
8:00 a.m.				General Session Jim Collins 8:00 - 9:15 a.m.	General Session John Kao 8:00 - 9:15 a.m.	W100 Sessions 8:00 - 9:15 a.m.	8:00 a.m.
8:30 a.m.	Certificate Programs 8:30 a.m. - 4:30 p.m.	Certificate Programs 8:30 a.m. - 4:30 p.m.  Full-Day Preconference Workshops 9:00 a.m. - 5:00 p.m.  Half-Day Preconference Workshops 8:30 a.m. - 12:00 p.m. or 1:00 p.m. - 4:30 p.m.					8:30 a.m.
9:00 a.m.			International Orientation 9:00 - 10:15 a.m.				9:00 a.m.
9:30 a.m.				Speed Mentoring 11 a.m. - 12:15 p.m.	EXPO (9:30 a.m. - 4:30 p.m.)	EXPO Snack Break 9:30 - 10:30 a.m.	9:30 a.m.
10:00 a.m.			Newcomers Orientation 9:45 - 11:00 a.m.				10:00 a.m.
10:30 a.m.				EXPO Lunch 11:15 a.m. - 12:30 p.m.		W200 Sessions 10:30 - 11:45 a.m.	10:30 a.m.
11:00 a.m.						Lunch on own 11:45 a.m. - 1:15 p.m.	11:00 a.m.
11:30 a.m.						EXPO Grand Prize Drawing 12:45 - 1:00 p.m.	11:30 a.m.
12:00 p.m.			SU 100 Sessions 12:00 - 1:15 p.m.	M100 Sessions 12:30 - 1:45 p.m.			12:00 p.m.
12:30 p.m.							12:30 p.m.
1:00 p.m.							1:00 p.m.
1:30 p.m.							1:30 p.m.
2:00 p.m.			SU 200 Sessions 1:45 - 3:00 p.m.	M200 Sessions 2:15 - 3:30 p.m.			2:00 p.m.
2:30 p.m.							2:30 p.m.
3:00 p.m.							3:00 p.m.
3:30 p.m.							3:30 p.m.
4:00 p.m.			SU 300 Sessions 3:30 - 5:00 p.m.				4:00 p.m.
4:30 p.m.				M300 Sessions 4:00 - 5:30 p.m.			4:30 p.m.
5:00 p.m.		Newcomers Orientation 5:00 - 6:15 p.m.					5:00 p.m.
5:30 p.m.			Annual Meeting 5:30 - 6:30 p.m.	Meet-to-Eat 6:00 p.m.			5:30 p.m.
6:00 p.m.							6:00 p.m.
6:30 p.m.		Meet-to-Eat 6:30 p.m.	Meet-to-Eat 6:30 p.m.				6:30 p.m.
7:00 p.m.					ASTD Networking Night 7:00 - 11:00 p.m.		7:00 p.m.
7:30 p.m.							7:30 p.m.
8:00 p.m.							8:00 p.m.
8:30 p.m.							8:30 p.m.
9:00 p.m.							9:00 p.m.
9:30 p.m.							9:30 p.m.
10:00 p.m.							10:00 p.m.
10:30 p.m.							10:30 p.m.
11:00 p.m.							11:00 p.m.

### EXPO Hours:

#### Monday, May 7

9:30 a.m. - 2:15 p.m.

#### Tuesday, May 8

9:30 a.m. - 4:00 p.m.

#### Wednesday, May 9

9:30 a.m. - 1:15 p.m.

### Registration Hours:

#### Thursday, May 3

7:00 - 11:00 a.m. & 3:00 - 6:00 p.m.

#### Friday, May 4

7:00 a.m. - 6:00 p.m.

#### Saturday, May 5

7:00 a.m. - 6:00 p.m.

#### Sunday, May 6

7:30 a.m. - 6:30 p.m.

#### Monday, May 7

7:00 a.m. - 6:00 p.m.

#### Tuesday, May 8

7:00 a.m. - 6:00 p.m.

#### Wednesday, May 9

7:00 a.m. - 4:15 p.m.

## 貳、美國訓練與發展協會（ASTD）介紹

美國訓練與發展協會（American Society for Training & Development 簡稱 ASTD）成立於 1943 年，為世界最大的訓練與發展非營利組織，致力於職場學習及績效議題之專業服務。該協會會員遍佈全球一百多個國家，除美國本地有超過 128 個分支機構外，並與二十多個國家建立國際伙伴關係。成員主要來自於國際企業、中小型企业、政府、學術機構、管理顧問公司、教育訓練產品與服務之供應廠商等。近年來該協會聚焦於個人與組織學習及提升績效方面之專業服務，期能於關鍵性公共議題產生更大的影響力。

ASTD 提供之主要功能如下：

- 一、提供學習及績效領域之專業人士、教育訓練工作者與學生各種研究報告、分析資料、標竿學習、線上資訊、書籍及其他刊物等資源。
- 二、利用研討會、工作坊及線上學習等方式，提供各專業人士共同參與學習、討論之管道。
- 三、透過人力銀行與就業輔導中心之合作，提供學習者專業認證課程，學習期滿可授予相關專業證書。
- 四、擔任媒體及美國公共政策制定者專業發聲者之角色，並與其他協會、組織及教育機構合作。



五、在學習及績效評估方面，制定標準及研究最佳作法，供各界參考。

## 參、2012 年 ASTD 國際年會暨會展簡介

ASTD 為傳遞最新的教育訓練趨勢與實務，每年均舉辦國際年會暨會展（International Conference & Exposition, ICE），2012 國際年會暨會展於 5 月 6 日至 5 月 9 日在美國丹佛（Denver）舉行，邀請關心員工在職學習與從事教育訓練之學者、專家、實務界人士參與此一全球最大的學習盛會。在此，除能掌握到最新的訓練脈動、教學設計、評鑑及訓練移轉之實證案例外，與會者並能親睹世界級大師風采、聆聽獨到的見解。

今年來自美國以外之與會者計有 76 個國家、約 2,100 名，參加人數位居前五名之國家分別為韓國（384 人）、加拿大（188 人）、中國（175 人）、日本（146 人）及巴西（110 人）。經由主辦單位針對海外國際人士出席人數之統計發現，近幾年韓國係最積極參與本會議之國家，無論從參加的人數或在



會議中提供同步翻譯之機制，顯示該國企業對於人才培訓積極進取



的企圖心，此亦反映了該國在經濟及國力上逐漸增強之競爭力，如三星電子、現代汽車等企業，這幾年在國際市場之佔有率、產品創新能力，均已成為該領域之佼佼者。

今年大會之會議主軸、研討領域及多樣化的進行型式，說明如下：

#### 一、會議主軸及研討領域

今年大會之會議主軸為「學習新知，成就卓越（Learn something new, Perform something extraordinary）」，在 4 天的會議過程中，提供超過 300 場次之專題演講，讓與會人員得選擇有興趣之議題進行學習。專題演講之內容則分為一般主題與企業主題兩大類：

##### （一）一般主題（content tracks）涵蓋 8 個領域：

- 1.職涯發展（Career Development）。
- 2.教學設計與引導（Designing & Facilitating Learning）。
- 3.全球化人力資源發展（Global Human Resource Development）。
- 4.人力資本（Human Capital）。
- 5.領導力發展（Leadership Development）。
- 6.學習科技（Learning Technologies）。

7.衡量評估及投資報酬率 (Measurement, Evaluation, ROI)。

8.發展趨勢 (Trends)。

(二) 企業主題 (Industry Tracks)，涵蓋 3 個領域：

1.政府部門 (Government)。

2.高等教育 (Higher Education)。

3.銷售能的開發 (Sales Enablement)。

## 二、會議進行形式

今年會議進行之形式相當多樣化，包含 3 天的會前培訓認證課程、工作坊及大會 4 天的研習課程，內容多元且豐富，會議形式分為：

(一) 認證課程 (Certificate Program)：年會正式開會前 3 天舉辦

且須另行付費，課程內容主要是針對人力資源發展重要的議題進行深度之探討，完成者可獲 ASTD 培訓課程證書。

(二) 會前工作坊 (Preconference Workshops)：年會正式開會前

一天舉辦且另須付費，課程重點置於提供培訓新觀點或新技術之深度探討。

(三) 第 1 次參與者會議簡介 (Newcomers Orientation)：為使第 1

次參加 ASTD 年會之與會者能在最短時間內瞭解如何利用大會資源、獲得最佳體驗，大會在第 1 天研討會開始前，舉

辦第 1 次參與者會議簡介，會議中除介紹各項學習資源外，另邀請具有多次參加經驗的前輩分享他們的學習經驗及技巧，以提升首次參與者之學習成效。



- (四) 主題演講 (General Session)，此次邀請之主講者 (Keynote Speaker) 計有：柯林斯 (Jim Collins)、高健 (John Kao) 及海蒂 格蘭特·哈佛爾森 (Heidi Grant Halvorson)，講述選擇卓越、創新的作法及成功者之作為有何不同的最新概念。
- (五) 專題演講 (Concurrent Sessions)：提供超過 300 場次之專題演講，與會者可依其興趣安排學習課表進場聆聽。
- (六) 展覽會場 (Exposition)：展覽共舉辦 3 天，約有三百多家之學術組織、顧問公司、出版商展示最新的訓練教材、學習工具及概念等，會場中並設「與作者有約」專區，邀請數名知名作者親臨現場為新書宣傳並與參觀者互動。

#### 肆、會議主要內容摘錄

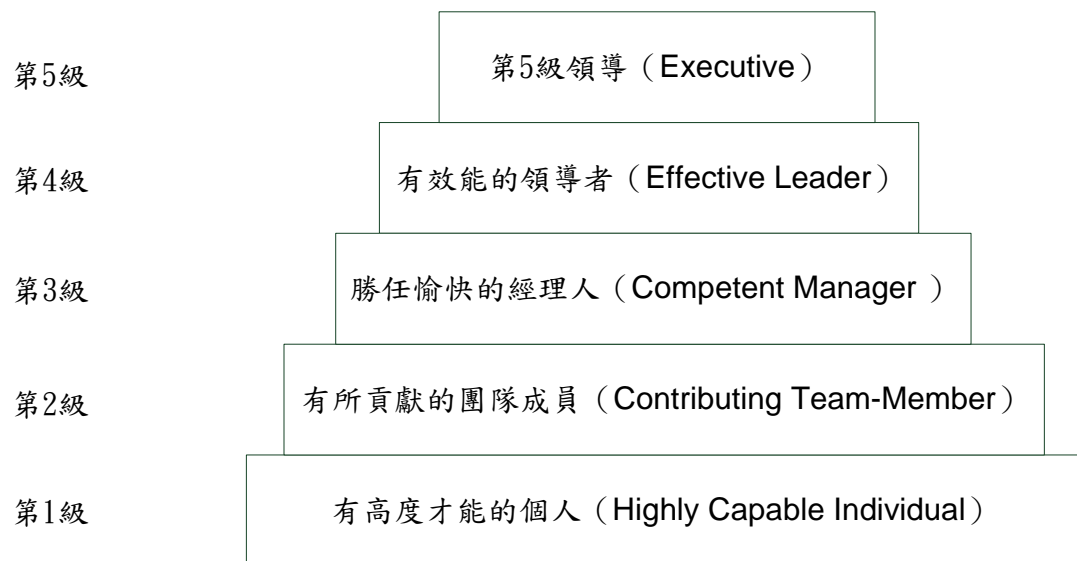
本次會議演講場次超過三百餘場，爰僅挑選大會最重要的主題

演講及部分最有興趣之議題予以介紹，茲將重要內容簡述如下：

#### 一、選擇卓越（Great by Choice） Keynote Speaker：Jims Collins

Jim Collins 從 1988 年開始任教於史丹佛大學企管研究所，傳授有關創業之課程，曾在 1992 年獲史丹佛大學傑出教師師鐸獎。1995 年離開史丹佛後，創辦自己的管理研究實驗室，專注在分析、研究卓越企業如何維持歷久不衰之原因、好的公司如何成為卓越之公司等議題，而出版之著作—「基業長青」、「從 A 到 A+」等書，在全球累計的銷售量已超過 700 萬冊。

「優秀是阻止你邁向卓越的敵人（Good is the enemy of great）」係 Collins 在《從 A 到 A+》這本書中即提出之觀點，本次的演講中，再次重申此一觀點。同時更進一步指出，在這社會、經濟、產業劇烈變動的不確定年代，能從優秀成為卓越的企業非關運氣而係選擇，最重要的是在於人的選擇，領導者如何將合適的人擺在適當的位置，讓他發揮影響力並帶領企業成長，為邁向卓越的關鍵因素。關於領導能力他提出 5 個層級之概念：



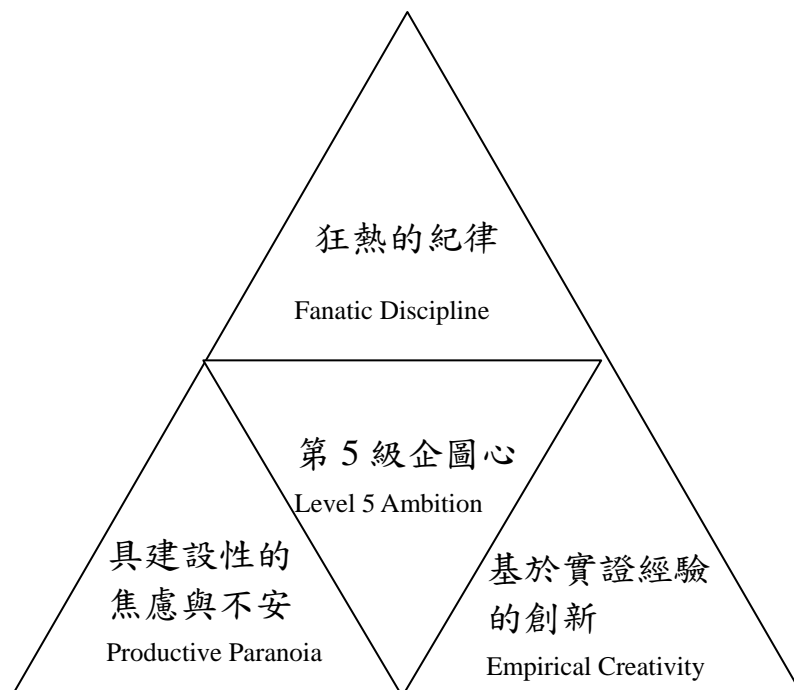
Collins 認為第 5 級領導之特質為謙虛的個性及專業的堅持，並建立持久的卓越績效。最重要的是，此一級之領導能力可經由培養，因此我們應建立一個完整的制度來培訓下一代的第 5 級領導。

接著，Collins 舉了一個 1911 年英國與挪威兩支到南極探險隊的故事，這兩支隊伍成員之人數相同，從出發地到南極同一時間均經歷了相同的暴風雪及低溫。更重要的是，兩隊的成員均未曾到過南極，亦非熟悉環境。最後結果是，挪威隊提早一個月抵達南極並成功歸來；而英國隊除了落後抵達目的地外，更在回程路途中遇到暴風雪而全軍覆沒。Collins 比較這兩支隊伍在整個探險過程中最大的差異在於挪威隊的「20 英里行進法則」。

所謂「20 英里行進法則」係指：挪威探險隊在出發前已做好自我控制之機制，無論是在惡劣或順遂之環境下，均依規劃之進

度每天前進 20 英里。而英國隊則依天氣的變化調整每天前進之路程，天氣好時多走，天氣不好則少走，甚至不走。

同樣處在目前這一動盪、變化快速的世界中，任何企業領導人對未來的不確定性均無把握，惟仍有部分企業不僅可以屹立不搖，甚至茁壯。為解開此類企業有如此卓越成績之原因，Collins 自 2002 年開始，即以美國近 2 萬間公司為樣本，進行層層的審核及過濾，從中找出 7 家安然度過產業逆境並茁壯之企業，並將該等企業冠上「10 倍數企業」之稱號。而從這 7 家「10 倍數企業」領導人之處事原則與心理素質中，歸納出 10 倍數領導者具有 3 項共通之特質及貫穿此 3 項特質之核心趨動力—第 5 級企圖心。



- (一) 狂熱的紀律：10 倍數企業追求之績效係長時間的一致性、持續性，而非一時的激情表現，因此領導者對於原則之堅持，已臻「狂熱」之程度，亦因這從一而終的堅持，讓領導者面對外界的變動及壓力時，總能秉持自律、不輕易妥協、並在既定的方向上穩定前進。
- (二) 基於實證經驗的創新：在不確定的未來環境中，10 倍數企業總是採步步為營之策略，在新產品推出之前，針對各種可能目標、範圍進行低風險、低成本之試驗，俟目標確認可行後再正式推出最好的產品，與競爭者一較高下。Collins 將此方法稱為「子彈先行、大砲在後」(Fire bullets, then cannonballs)。
- (三) 具建設性的焦慮與不安：10 倍數企業的領導者，無論公司處於任何狀況，對於未來始終抱著戒慎恐懼之心態，且隨時保持著備戰之狀態，對最壞的狀況已作最好的準備。因此，無論外在的環境如何險惡，最終總能突破困境並成長茁壯。
- (四) 第 5 級企圖心：領導者具備上述 3 項特質，即能帶領企業成為 10 倍數之企業嗎？顯然不是。Collins 認為貫穿此 3 項特質之核心趨動力——第 5 級企圖心，亦即領導者將企業看得比自己重要，無論做任何決策，均將公司的利益置於第一優



先順位，絕不為個人牟私利，因此得以說服人、激勵人心，

讓部屬願意跟隨著他為公司創造卓越的績效。

在會議結束前，Collins 送給臺下與會者 10 個建議，期使平

常協助同仁成長之人資專家亦能有所成長：

- 1.致力於發展一個卓越的團隊。
- 2.在關鍵的位置上找到合適的人來帶領團隊。
- 3.對事情保持興趣並提出更多的問題。
- 4.召開面對殘酷現實的會議，從中找出這些挑戰是內部還是外部造成的。
- 5.找出你的刺狹特質（熱情、執行力、趨動力）在哪裡？你對什麼事情充滿熱情？你是否投入熱情後即期待有所回報？你天生的專長為何？在哪些地方能充分展現你的價值？
- 6.在 20 英里的行進法則中，你的持續性及連慣性為何？處在此一失控的世界中，你如何保持紀律及控制？一天當中，你對時間分配之百分比（50：30：20）為何？
- 7.在下次好運來臨並獲得最大成就前，你要知道你最大幸運的來源在哪？
- 8.擬定不執行的事項清單，如有超過 3 個優先事項要做，那

將無法完成任何一項。

9.每 2 週至少找出 1 天的時間，關閉你的電子設備（不要接聽手機、上網、收發電子郵件等），給自己一個安靜的時間進行獨立思考。

10.建立你的願景：（1）你人生的核心價值是什麼？（2）你有哪些價值可以世代相傳並且影響家人？你的核心目的為何（你的人生意義是什麼）？（3）建立長期（10~15 年）的人生規劃。

## 二、創新的藝術(The art of getting innovation done)—Keynote Speaker：

John Kao

高健（John Kao）被經濟學人雜誌稱為「創意先生」及「持續創新者」，係創新、組織轉型之領導權威人士。過去 30 年，高健一直是創新戰略與能力開發方面之顧問，備受公私部門組織的信賴。

在本次的演講中，為使與會者對創新的概念有實際感受，高健採異於傳統之演講方式，以鋼琴演奏爵士樂貫穿整場演講的形式向大家說明爵士樂與創新間之關聯性，進而詮釋創新的意涵，讓台下的與會者體驗一場「創新」的專題演講。

Kao 認為人均有新的想法之能力，而創新是開發能力與使用

能力的一種手段，同時亦可開創各式各樣的價值。他以爵士樂的演奏為例，若我們拿到一本樂譜，並按裡面的樂譜彈奏，其實是一件很枯燥的事。然而，爵士樂家在彈奏此一音樂時，除利用基本的樂譜（框架）作為彈奏主軸外，同時在樂符間加入一些即興（新元素）的創作，讓聆聽的觀眾充滿驚喜的體驗。Kao 解釋即興創作之樂符並非為變化而變化之雜音，音樂均有一定的樂理規則，你不能破壞這些規則，同時演奏者亦須有紮實的基本技巧，始能在此旋律之框架中彈奏出令人驚喜且優美的音樂。

為使大家體驗每個人均有創作之能力，Kao 在會場中進行一個即興說故事的遊戲，遊戲以兩個人為一組，他先描述故事的開場情境（框架）後，隨即讓底下的與會者接下去講故事（新元素），隔一段時間後再換該組的另一成員接續創作，過程中反覆該動作。此一講故事的遊戲讓全場的氣氛非常熱烈，原因即在於即興發揮令人們感到興奮、愉悅且湧現出很多靈感，讓我們產生創作的衝動。

Kao 指出創新當然不會僅侷限在個人，它同樣可應用在團隊中。他以星艦奇航記（Star Trek）為例，影片中的 4 個人物分別屬於直覺、情緒、感覺、思考之人格特質，將這不同特質的成員聚集在一起，每個成員除可強化自己的專長外，尚可找出自己需

要努力的項目，進而碰撞出一些創新的火花。

### 三、成功者之作為有何不同 (What successful people do differently)

Keynote Speaker：Heidi Grant Halvorson

Heidi 係一名社交心理學家兼教育顧問，她的研究領域主要在瞭解人們面對挫折及挑戰時如何作回應，以及此類回應之方式與其追求的目標類型之關聯性。在會議一開始時，她即以「成功者之作為有何不同？」(What do successful people do differently) 讓大家去思考這問題。Heidi 認為我們每個人均為說故事者，經常將我們所經歷的各種體驗轉化成認知的情境，而我們的大腦常使用此類情境幫助我們瞭解生活周遭的事物，甚至引導我們做決策。但很多人其實不瞭解自己，例如在界定成功或失敗之原因時，總將成功或失敗歸因於先天能力或運氣等因素，事實上成敗與否取決於你做什麼和不做什麼的取捨。

依據她的研究結果顯示，我們想去作一件事與真正落實地執行它，中間存在著巨大的落差，而要消除這中間的落差，可利用建立成功的心態及制定詳實的行動計畫兩策略。

#### (一) 準備階段：建立成功的心態

成功的心態係指凡事秉持「變得更好」的想法，在這種

思維之下，我們將專注於自我能力之提升、隨時將今天的我與昨日的我做比較，要求自己每天均須有所成長。由於保持著「變得更好」的心態，因此面對任何須予執行之任務均能保持著高度的興趣且融入在工作的樂趣中，同時對任務的執行均能做深度的思考，以獲得更高的創造力，即便在執行過程中遭遇挫折，亦能堅持信念將任務完成，以創造卓越的績效。為幫助員工建立這種心態，Heidi 建議管理者對部屬應多採用誘導、鼓勵之辭彙，如培訓、發展、學習技能、提升問題之解決能力等，並鼓勵員工在評估自己的表現時，應與過去的自己比，而非與周遭的同事比較。

## （二）執行階段：制定詳實的行動計畫

Heidi 表示人們無法由「知」（有意願要做）的階段轉化到「行」（開始去做）的階段，最主要的原因有二：1.執行的目標不明確。2.錯過執行的良機。如擬改善其中的落差，建議可用「If-Then Planning」的工具，將你要在什麼時間、地點執行什麼任務，研擬一份詳實的行動計畫。根據她的研究，預先將執行任務的時間、地點等各項情況要件規劃好，一旦大腦檢測到符合該情況時，人們大多會開始執行該項任務。

四、期望達成率：Kirkpatrick 四階層的新世紀（ROE Part 2: The New World Kirkpatrick Four Levels）— Speaker：Wendy Kayser Kirkpatrick

訓練係人力資源發展之一環，透過有計畫的訓練，可使人在短時間內獲得工作上所需之知識及技能。然而，訓練的實施並非意味上述訓練目的之達成，必須藉由可靠的訓練績效評鑑制度或方法，始能客觀地呈現訓練成效。訓練績效之評鑑有許多模式，其中最常引用的是 Kirkpatrick 的 4 階層模式。

第一層 反應層評估（Reaction）：在訓練結束時，向受訓學員發放滿意度調查表，取得學員對講師教授方式、訓練內容安排、教學設施之反應及感受。

第二層 學習層評估（Learning）：確認學員在訓練結束後，是否在知識，技能，態度等方面學習到新的東西。

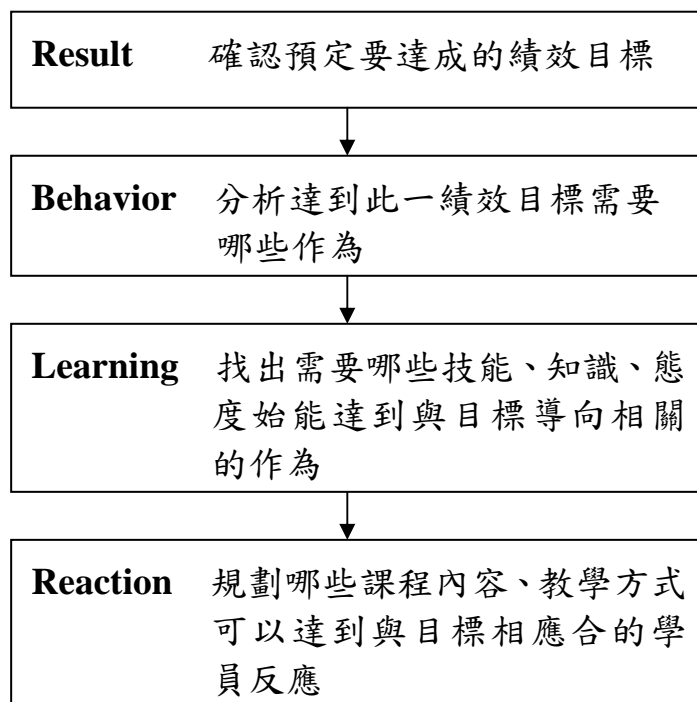
第三層 行為層評估（Behavior）：確認學員訓練結束後回到工作崗位，是否將所學知識、技能、態度運用在工作上。

第四層 結果層評估（Result）：組織是否因成員訓練後，在工作上運用所學而提升整體營運績效。

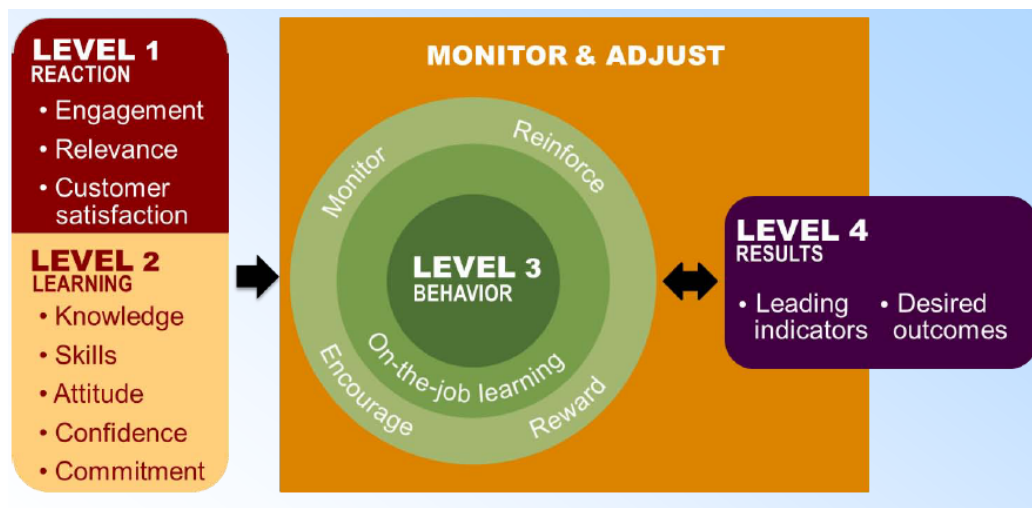
根據各項訓練結果統計，大多數的訓練成效都只達到第一層及第二層的程度，能達到第三層甚至第四層目標之案例並不多，



顯然訓練的結果與預期達到的目標存在著巨大的落差。如擬減少其中之落差，主講者 Wendy 提出「以終為始」(The End is the Beginning) 之概念，亦即以結果導向之思考模式來設計更有效的訓練課程。結果導向訓練規劃之流程如下圖所示：



完成結果導向之訓練規劃後，進入執行評估階段時，Wendy 提出一個全新的 Kirkpatrick 評估模式。





相較於原先之 4 階層模式，此一新的評估模式增加了幾項特色：

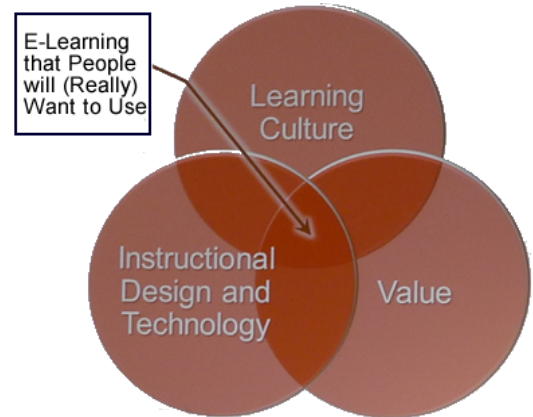
- (一) 考量學員對訓練的反應與知識、技能的取得是同步發生，因此將第一層和第二層結合在一起評估。
- (二) 在第一層的項目中除原本的上課滿意度外，另增加學員在上課中的投入度（Engagement）及課程內容與工作的相關性（Relevance）。
- (三) 在第二層的項目中增加信心（Confidence）及承諾（Commitment）兩項，亦即除原本所學之知識、技能與正向態度外，尚須具備信心與承諾，始有機會將訓練的結果應用到工作中。
- (四) 第三層的項目中，增加在職學習、監督、鼓勵等項目，亦即員工受完訓回到工作崗位後，在他工作的過程中，可利用鼓勵、獎賞、監督及督促等機制，誘導他持續的自我學習，期能達到預定之目標。
- (五) 第四層的項目中，增加領先指標及預期結果兩項，並在第三層及第四層中加入監測（Monitor）及調整（Adjust）之機制。其目的係為確保最後的結果能符合我們的期待，利用領先指標進行適當的監測及調整，使訓練能為組織帶來正面的影響。

## 五、建構人們真正想用的數位學習 (Building E-Learning that People will

Really Want to Use) —Speaker：Marc Rosenberg

隨著科技技術的進步及網際網路的普及，學習與網路結合的 E-learning 學習模式，已成為各企業及訓練機構積極發展的項目之一。然而，部分學習者對於 E-learning 的學習經驗不佳，甚至視

為畏途，如擬改善此一困境，本次會議主講者 Rosenberg 依據他多年擔任發展 E-learning 的顧問經驗指出：由學習文化 (Learning Culture)、價值 (Value) 與教學設



計及科技 (Instructional Design and Technology) 等三要素交集所製作之數位學習內容，始係學習者想用的數位學習。為評估 E-Learning 之服務能否滿足學習者的期待，Rosenberg 提供了 13 個面向 40 個問題之檢測項目，予與會人員評估該組織的 E-Learning 位在哪一等級中，以作為後續改善之依據。茲將上述 13 個面向中須予檢核之問題加以說明如下：

(一) 以終為始的思維：E-Learning 是要提供給誰來使用？對這些

使用者而言，什麼東西對他們是最重要的？

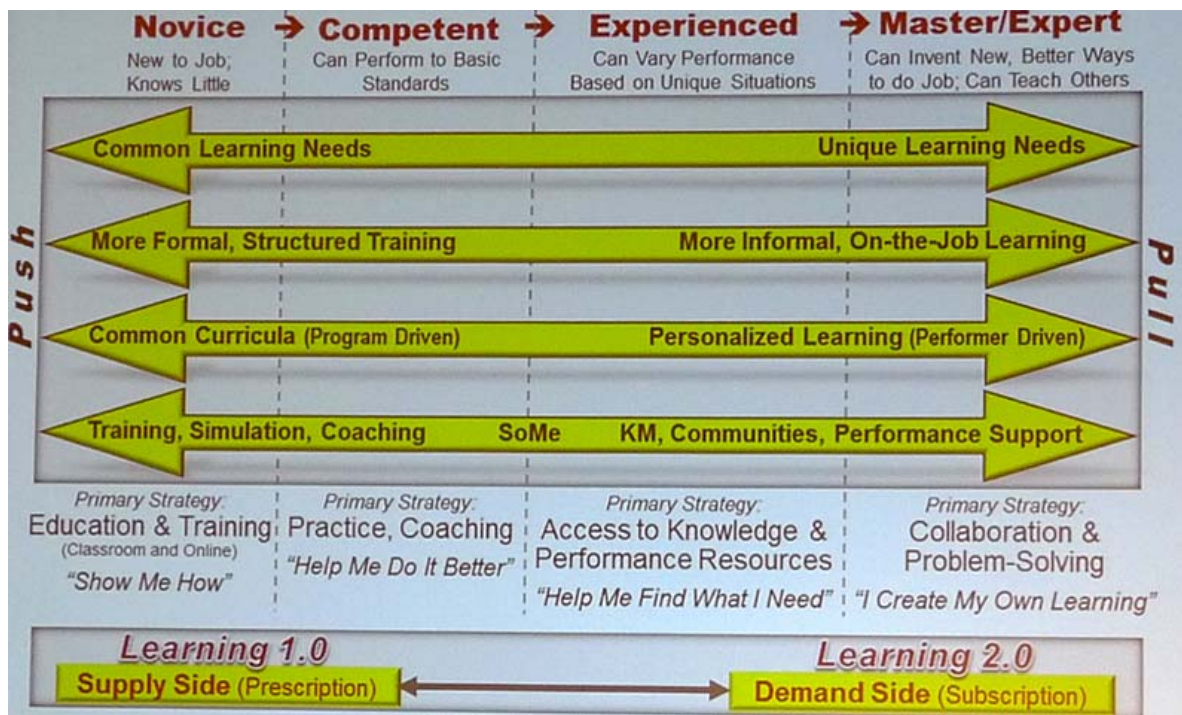
- (二) 專注在正確的優先順序上：確認什麼是最重要的？什麼是不重要的？對此類認定，大家有共識嗎？你知道有多少重要的項目是你可以掌控的？
- (三) 運用適當的技術：技術在 E-Learning 中僅係推動促成之元素，而非策略，當技術越容易使用，即越容易濫用。因此，我們須確認所使用的技術是否滿足核心使用者的需求？此一服務是否隨時隨地均可使用？
- (四) 不要認為將資料放在網路上，即係線上學習：你是否將網路上的教材經過良好的轉製？你是否在課程內容中充分運用媒體的特點？
- (五) 確認學習者的是否都準備好了：學習者進行 E-Learning 時，對網路環境、電腦設備等各項需求是否清楚？在學習的過程中及學習結束後需要做什麼是否清楚？
- (六) 課程能準時上線：當課程無法準時上線，滿足學習者的學習需求，訓練的成效即會大打折扣。
- (七) 確認課程內容的正確性：E -Learning 的教材是否正確及合適？教材的內容有無經過審核？課程中最好是用真實的案例。
- (八) 課程內容避免枯燥乏味：並非具有互動效果之內容即能引起

學習者的興致，而係課程內容能引發學習者的思考進而內化成為日常生活的思維或習慣，始為學習之真諦。因此，課程中的互動對學習者有意義嗎？是否具有挑戰性、激勵的效果？

(九) 少說話多教學：一個完整的課程應包含教材講解、練習及評量 3 部分，其所占的比重建議為 50%、35%及 15%。因此，教材各項的比重分配是否適當？學習者是否有充分機會練習？是否有學習的回饋機制？

(十) 易於操作的使用者介面：過於複雜的操作流程或介面，將增加學習者的學習負擔。因此，操作介面能否讓使用者快速上手？該介面有無提供個人化之設計？

(十一) 提供符合學習者等級的學習策略：Rosenberg 將學習者等級分為初學者、勝任者、有經驗者、專家 4 個等級，並強調越是專業的訓練越傾向邊做邊學、個人化、績效導向的學習訓練，亦即所謂的需求拉動 Learning 2.0 模式。(如下圖)



因此，如擬提供符合學習者等級的學習策略時，學習者的等級我們清楚嗎？對於不同等級的學習者知悉採用何種學習策略嗎？

(十二) 所學的內容能運用到工作中：學習者能將所學的知識及技術運用到工作中，進而提升組織的績效是訓練的最終目標。然而，我們提供的學習內容與工作有相關嗎？在組織內是否支持知識分享的機制？學習者知道如何自我學習嗎？

(十三) 創新：改變既有的學習方式並不是一件容易的事，因此，組織及成員是否已接受這種新的學習模式？能否掌控在推動過程中所遭遇的阻礙？此一改變能否長期地推動下去？



## 伍、研討心得與建議

### 一、做好參加前的準備工作：

ASTD 在 4 天的會議過程中，提供超過 290 場次之專題演講，在參加前均須做好課程規劃，始能在學習的過程中獲得最佳的學習效果。上課前相關的準備工作應包含：

#### (一) 詢問自己是帶著什麼問題到 ASTD 找解答：由於課程內容相

當多元及豐富，每人在 4 天的會議中，最多僅能參加 12 堂課程。因此，可利用結果導向之思考模式（問題→結果→解決方案），先確認目前工作中遭遇哪些問題？有哪些挑戰？再依據問題面向挑選與其相關聯之課程進行學習時程安排。

#### (二) 做好預習功課：在會議開始前一週，大部分之主講者會將上

課簡報檔上傳至大會之網站，如課前能閱讀完簡報資料並找尋相關背景資料加以預習，即便外語能力稍差的人，亦能在課程中掌握住重點並獲得所需之解決方案。

#### (三) 課程衝堂之選擇：從今年開始，ASTD 主辦單位在會議結束

後 30 天，將提供近 120 門課程之簡報錄音檔予與會者上網閱讀。因此，如擬參與之課程時段相互重疊，即應參加未提供錄音檔之課程，另一堂課則於會議結束後，再利用大會提供之錄音檔進行學習。

## 二、建構無紙化的學習環境

本次年會除按往例在網站上提供各課程之簡報檔外，另一項創新服務係提供行動載具 APP 之服務，與會者僅須在其行動裝置下載安裝 APP 程式，即可進行個人化之課程安排、課程簡報資料之閱讀、上課滿意度之調查等應用，充分達到學習無紙化之目標。鑒於未來智慧型手機或平板電腦之普及率將快速成長，本學院未來在辦理國際研討會或短期班訓練時，可參考本次會議之作法，建置研習課程之 APP 服務，提供活動課表、講座介紹、課程簡報內容、滿意度調查、交通方式等各種學習資訊，俾使參加者充分享受無紙化之學習樂趣。

## 三、善用行動載具的優勢

從今年 ASTD 與行動學習相關的課程主題及展場中展示多樣的應用實例觀察到，行動學習之趨勢有如當年網路普及時 e-learning 那般銳不可擋之發展風潮，ASTD 執行長 Tony Bingham 甚至使用「完美風暴」來形容這一波之發展趨勢。在多位人資專家不約而同看好該學習趨勢之前提下，各訓練機關是否要投入人力、時間、金錢朝行動學習之應用發展，實已造成不少的困擾。以本學院為例，現有之 e-learning 系統如擬維持基本運作及持續吸引學員上網學習，每年投入之預算在新臺幣 400 萬元以上。而



發展一門行動學習課程，因目前行動載具作業系統、顯示畫面規格不一，如擬滿足各系統的學習者需求，所需費用至少為 Web Based 數位教材之 2 倍。在經費有限的情況下，行動載具之優點如何應用在學院的訓練上，建議可朝精簡化與學習評估兩方面進行規劃：

- (一) 精簡化：行動學習的課程長度最好不要超過 10 分鐘，課程之介面以簡單清楚、易操作為原則。
- (二) 學習評估：利用行動載具最大的特點「隨處上網、隨時獲取資訊」，在本學院辦理各項訓練時，可利用行動載具進行學習成效評量、講座授課滿意度調查等應用，以快速掌握各項訓練的實施成效。

## 陸、結語

本次參與世界最大的學習活動盛會，收穫豐碩，無論在國際視野之開拓、人力資源管理發展新趨勢之汲取等，均獲得更深層的體會。同時，經由研習活動的參與，掌握到規劃大型國際研討會的訣竅，從場地動線之標示、志工人力之協助、學習交流空間之設計、科技技術之應用、會前資料準備、會中課程安排、諮詢服務及會後影音檔提供等創新且可行之作法，均可提供學院未來辦理各項研習課程之參考。4 天的研習課程雖短，但在觀念上造成正面的衝擊，於日後公務生涯中極有助益。因此，建議日後賡續選派適當同仁參與本項研習活動，從中汲取訓練新知及技術，並將所學應用於工作，以發揮訓練之最大成效。

## 柒、參考書目

### 一、中文部分

郭子苓 選擇卓越：企業如何屹立不搖、日益壯大，《經理人月刊》

2012 年 5 月號 090 期第 86-89 頁

郭振昌 柯氏（Kirkpatrick）訓練評估模式的修正與反省，《台灣勞

工季刊》2012 年 3 月號 29 期第 115-124 頁

### 二、英文部分

<http://tubarks.wordpress.com/2012/05/08/astd-keynote-presentation-jim-collins/>

<http://tubarks.wordpress.com/2012/05/12/astd-keynote-heidi-grant-halvorson/>

<http://tubarks.wordpress.com/2012/05/09/keynote-speaker-john-kao/>

<http://tubarks.wordpress.com/2012/05/07/building-elearning-that-people-will-want-to-use/>

<http://bfsglobal.wordpress.com/2012/05/08/jim-collinsastd/>

<http://blog.clomedia.com/2012/05/1d-and-all-that-jazz-at-astd/>

## 捌、附錄

### 附錄 1 ROE Part 2:The New World Kirkpatrick Four Levels 簡報資料



## **ROE Part 2: The New World Kirkpatrick Four Levels™**

Wendy Kayser Kirkpatrick

Session W116

 **KIRKPATRICK PARTNERS**  
The One and Only Kirkpatrick®

## Session Objectives

- Define return on expectations for any program or initiative
- Use the Kirkpatrick Model to create and demonstrate program value
- Create a meaningful chain of evidence showing the value of training with quantitative and qualitative data and information

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## What is ROE?

### **re turn on ex·pec·ta·tion**

\ri-tərn . n ek-spek-tā-shən\ - noun

1. What a successful training initiative delivers to key business stakeholders demonstrating the degree to which their expectations have been satisfied

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## Partner Discussion

How do your stakeholders measure the value of training in your organization?

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.







## Why Evaluate?

**Improve  
The Program**



***Effective Training***

**Maximize  
Organizational Results**



***Training Effectiveness***

**Demonstrate  
Program Value**





## LEVEL 1: REACTION



To what degree participants react favorably to the learning event

©2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## LEVEL 2: LEARNING



To what degree participants acquire the intended knowledge, skills and attitudes based on their participation in the learning event

©2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## LEVEL 3: BEHAVIOR



To what degree participants apply what they learned during training when they are back on the job

©2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## LEVEL 4: RESULTS

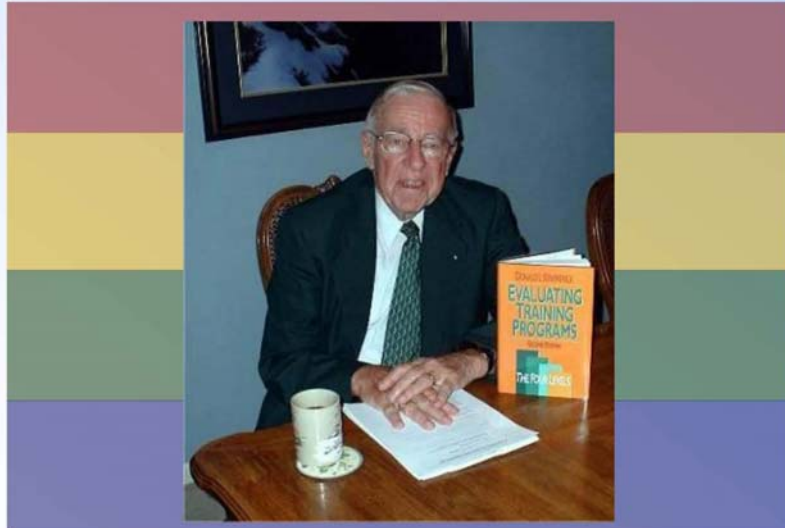


To what degree targeted outcomes occur, as a result of learning event(s) and subsequent reinforcement

©2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## The End is the Beginning



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## The End is the Beginning

**Level 4: Results**

**Level 3: Behavior**

**Level 2: Learning**

**Level 1: Reaction**

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## Executive Leadership Development Initiative

### The CEO's Story

- Dept. managers not working together to solve problems
- Defective parts
- Order shipped late; 8% penalty
- Revenue down 5% last week
- Afraid of losing big customers
- Revenue down 10% year to date

Revenue must increase 10% by end of year



Debbie



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### The Department Managers' Story

- Warning this could happen for months
- Production Manager didn't allow parts inspection
- Defective parts order caused delay in shipment
- Managers have excuses for not getting together
- Differing priorities

Departments have conflicting goals



Cindy (representing all department managers)



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### VP of Operations

- Coordinate all departments
- Track and report overall status
- Resolve any performance issues



Dale

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### Level 4 Results

Increased revenue

### Level 3 Behavior

1. Create action plan for each dept.
2. Attend weekly manager meetings
3. Conduct accountability conversations for all depts. below plan

### Level 2 Learning

After training, the VP and dept. managers will be able to:

- Create departmental action plans
- Demonstrate a team meeting in a role play
- Explain the steps in an accountability conversation

### Level 1 Reaction

Satisfaction with the program

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.





© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## THE NEW WORLD KIRKPATRICK MODEL

### LEVEL 1 REACTION

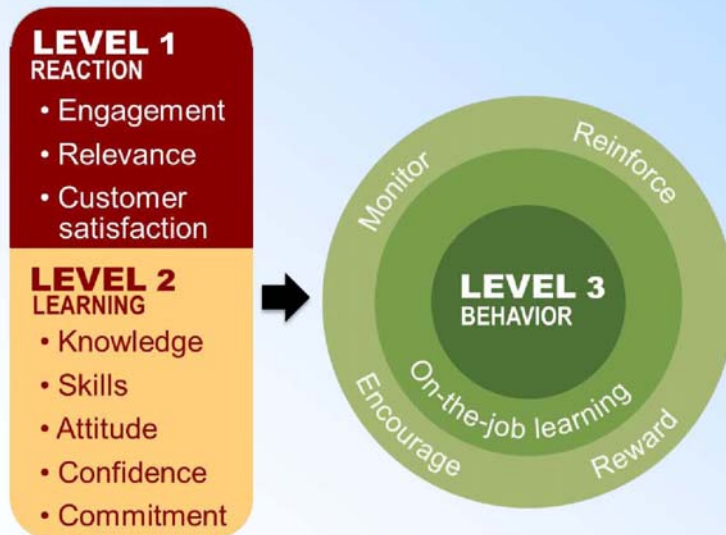
- Engagement
- Relevance
- Customer satisfaction

### LEVEL 2 LEARNING

- Knowledge
- Skills
- Attitude
- Confidence
- Commitment

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## THE NEW WORLD KIRKPATRICK MODEL



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Level 3: Behavior

### Required Drivers

Processes and systems that reinforce, monitor, encourage, and reward performance of critical behaviors on the job

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Required Drivers

Support	Reinforce	Follow-up modules Work review checklist On-the-job training (OJT) Self-directed learning	Refreshers Job aids Reminders Executive modeling
	Encourage	Coaching	Mentoring
	Reward	Recognition Bonuses	Pay for performance
Accountability	Monitor	Action learning Interviews Observation Self monitoring KPIs (Key performance indicators)	Action planning Dashboard Work review Survey

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Volunteers

What drivers are you using?  
 What new driver are you inspired to try?



## THE NEW WORLD KIRKPATRICK MODEL



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Level 4: Results

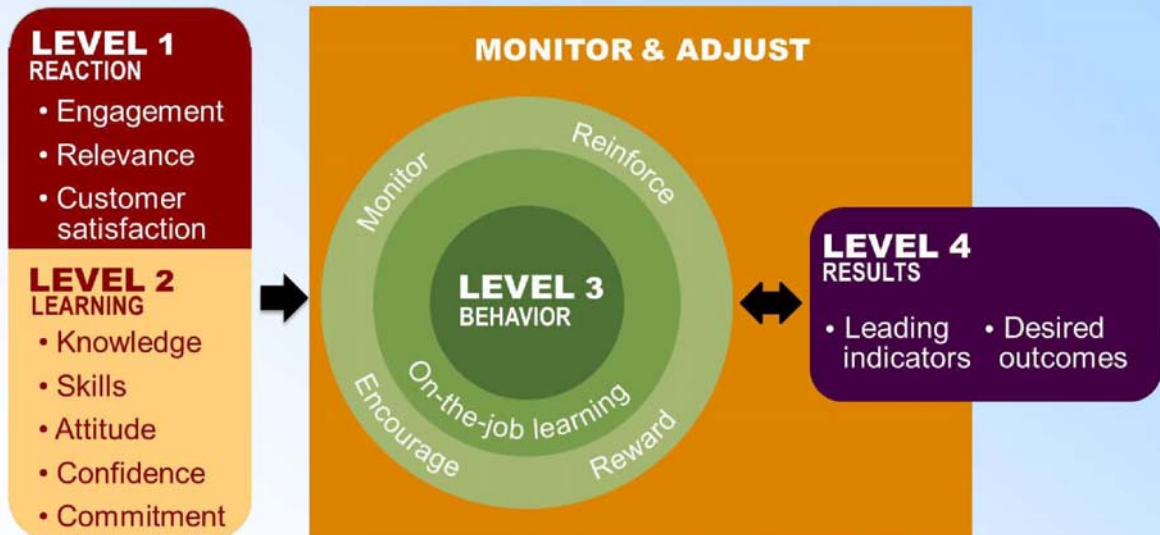
### Leading Indicators

Short term observations and measurements that suggest that critical behaviors are on track to create a positive impact on desired results

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## THE NEW WORLD KIRKPATRICK MODEL



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### New World Additions

#### Level 4 Results

Increased revenue

#### Leading Indicators

- On time shipments
- Quality
- Employee satisfaction scores
- Weekly sales numbers

#### Level 3 Behavior

1. Create action plan for each dept.
2. Attend weekly manager meetings
3. Conduct accountability conversations for all depts. below plan

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## Partner Discussion

Identify at least one required driver you would put in place for this critical behavior:

Attend weekly manager meetings

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Required Drivers

Support	Reinforce	Follow-up modules Work review checklist On-the-job training (OJT) Self-directed learning	Refreshers Job aids Reminders Executive modeling
	Encourage	Coaching	Mentoring
	Reward	Recognition Bonuses	Pay for performance
Accountability	Monitor	Action learning Interviews Observation Self monitoring KPIs (Key performance indicators)	Action planning Dashboard Work review Survey

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## Executive Leadership Development Initiative

### New World Additions

#### Level 3 Behavior / Required Drivers

1. Create action plan for each department
  - Monitoring: Plans reviewed in executive meeting
  - Rewarding: completion of plans part of KPIs upon which compensation is determined
2. Attend weekly team meetings
  - Monitoring: Meeting minutes submitted weekly by admin for VP of Operations
  - Reinforcing: CEO talks about importance of team meetings in quarterly meeting
3. Conduct accountability conversations for all depts. below plan
  - Monitoring: Bi-weekly meeting of VP of Operations and CEO to review

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### New World Additions

#### Level 2 Learning

##### *Attitude (Will this be worthwhile?)*

- Conversation with VP of Operations before training
- Group discussion during training.

##### **Confidence**

- Evaluation form: How confident do you feel to create the action plan for your department?

##### **Commitment**

- Evaluation form: How committed are you to creating and following an action plan?
- Part of weekly team meeting

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### New World Additions

#### Level 1 Reaction

##### Engagement

Pulse checks during training

##### Relevance

Group discussion during training




Course evaluation




© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## EXECUTIVE LEADERSHIP DEVELOPMENT INITIATIVE

WEEK OF APRIL 4-8

METRIC	ACTUAL	TARGET	STATUS
Action plans created	5	6	↑
Weekly manager meetings held	83%	92%	↑
Accountability reports for departments below plan	80%	100%	↓
Bi-weekly review of accountability reports completed	83%	100%	↑
On time shipments	96%	95%	↔
Quality score	96.9%	98%	↓
Weekly sales	\$117.8	\$120.0	↑
Company revenue YTD	\$1405.0	\$1540.0	↑

 = Meeting target  
 = Somewhat below target  
 = Significantly below target

 = Up from last month  
 = Down from last month  
 = Same as last month

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Chain of Evidence



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Executive Leadership Development Initiative

### The Organizational Effectiveness Manager's Testimony

- **Level 2**
  - Confidence rating of 88%
- **Level 3**
  - 5 of 6 managers completed action plans
  - Weekly team meetings held 5 of 6 weeks
  - Coaching sessions
  - Accountability reports submitted
- **Level 4**
  - On time shipments of 95%
  - Quality score of 97%
  - Employee satisfaction at 4.8 / 5.0



Martina

Revenue up 2%



© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.



## Partner Discussion

How convincing is Martina's testimony?

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.





- Define return on expectations for any program or initiative
- Use the Kirkpatrick Model to create and demonstrate program value
- Create a meaningful chain of evidence showing the value of training with quantitative and qualitative data and information



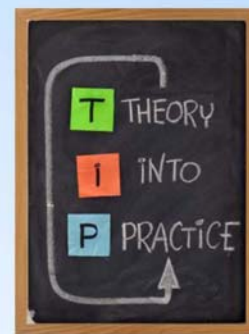
## Register for FREE Resources

### Links to:

- Online resource library with 60+ items
- White paper and article
- LinkedIn Kirkpatrick Evaluation discussion group

### Subscription to:

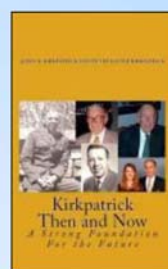
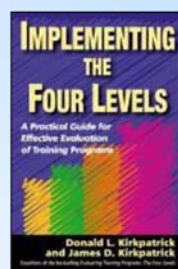
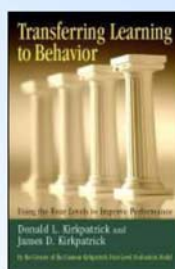
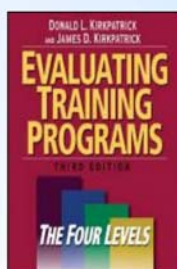
- Weekly e-newsletter
  - Kirkpatrick Quick Tips
  - Articles
  - News, specials and events



**Kirkpatrickpartners.com**

© 2010-2012 Kirkpatrick Partners, LLC. All rights reserved.

## Thank You!



information@kirkpatrickpartners.com

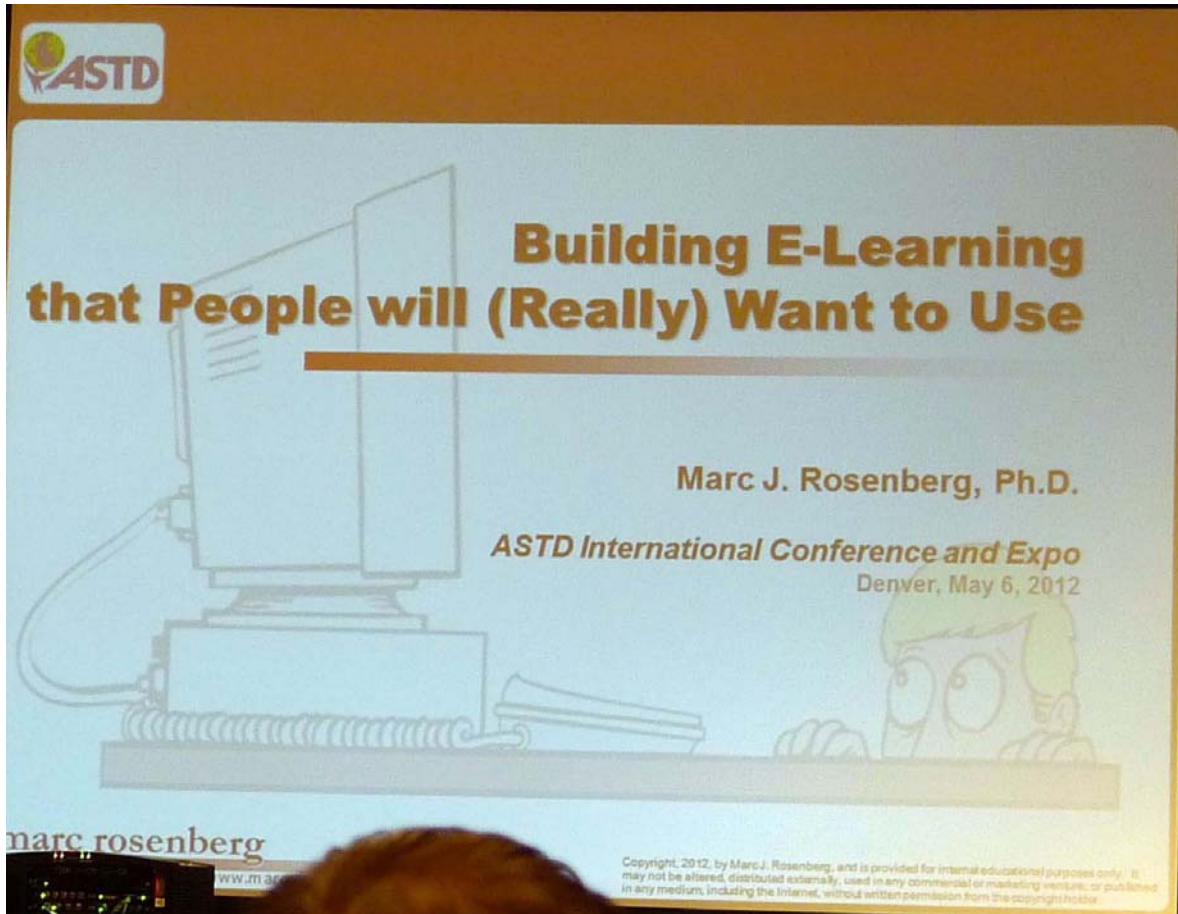
(443) 856-4500

kirkpatrickpartners.com

**Kp** KIRKPATRICK PARTNERS  
The One and Only Kirkpatrick®



附件 2 Building e-elearning that people will (Really) Want to Use 簡報  
資料

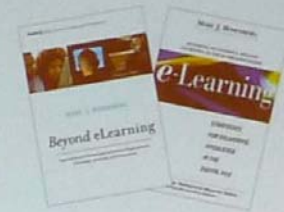


## About your speaker



Dr. Marc J. Rosenberg is a leading management consultant, speaker and educator in the fields of training, organizational learning, e-learning, knowledge management and performance improvement.

He is the author of the best-selling books, *E-Learning: Strategies for Delivering Knowledge in the Digital Age* (McGraw-Hill), and *Beyond E-Learning: Approaches and Technologies to Enhance Organizational Knowledge, Learning and Performance* (Pfeiffer). His monthly column, "Marc My Words," appears in the eLearning Guild's *Learning Solutions* online magazine.



Marc is a past president of the International Society for Performance Improvement (ISPI), and holds a Ph.D. in instructional design, plus degrees in communications and marketing. He also holds the Certified Performance Technologist (CPT) designation from ISPI. Dr. Rosenberg has spoken at The White House, debated the future of e-learning at Oxford University, keynoted numerous professional and business conferences, authored more than 40 articles and book chapters in the field, and is a frequently quoted expert in major business and trade publications. He is a former vice president of his local community's Board of Education.

More information about Marc is available at [www.marcrosenberg.com](http://www.marcrosenberg.com).

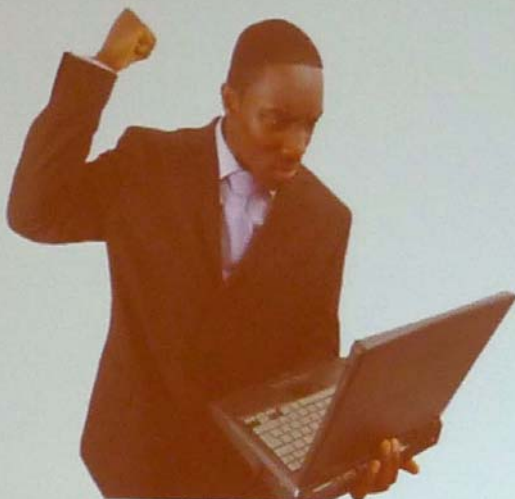
marc.rosenberg

rosenberg

Building E-Learning That People Will (Really) Want to Use  
 ©2012 by Marc J. Rosenberg, all rights reserved  
 Page 2

ASTD 2012  
 INTERNATIONAL  
 CONFERENCE &  
 EXPOSITION

## What's your experience with e-learning?



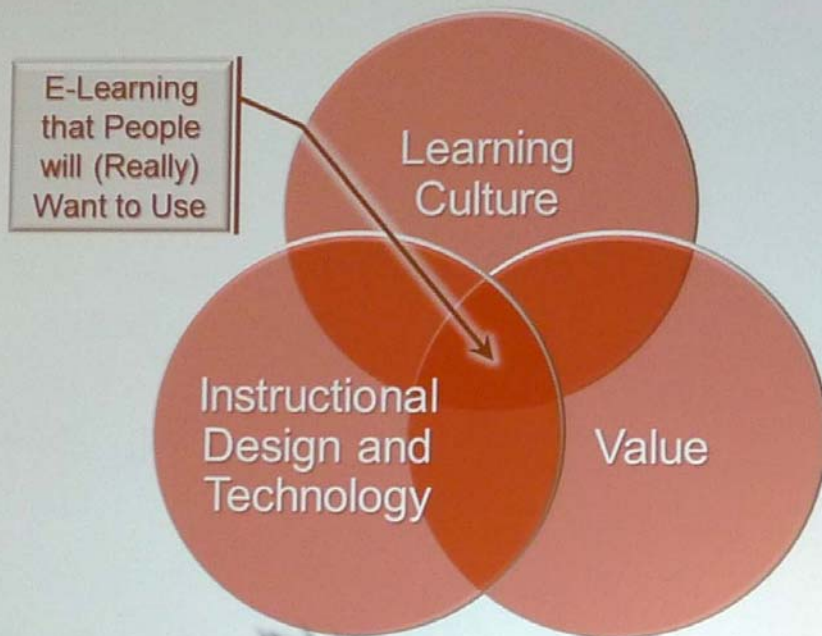
marc.rosenberg

Building E-Learning That People Will (Really) Want to Use  
 ©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
 INTERNATIONAL  
 CONFERENCE &  
 EXPOSITION



## Finding the "sweet spot"



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 4

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXHIBITION

## Finding the "sweet spot:" A baker's dozen approaches to building great e-learning

The diagram shows the same Venn diagram as above, but with a large red arrow pointing from the intersection of the three circles to a document titled "Building E-Learning that People will Want to Use Checklist and Assessment Tool". The document includes a table with 40 questions in 13 focus areas.

**40 Questions in 13 Focus Areas**

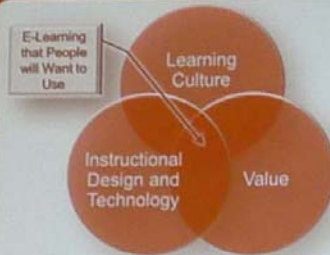
Question	Score
1. Begin with the end in mind	1 2 3 4 5
2. Have you identified the real client?	1 2 3 4 5
3. Have you identified the real client?	1 2 3 4 5
4. Have you identified the real client?	1 2 3 4 5
5. Do you know how many critical priorities you can handle?	1 2 3 4 5
6. Is there consensus?	1 2 3 4 5

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE

## Finding the "sweet spot:" A baker's dozen approaches to building great e-learning



1. Begin with the end in mind
2. Focus on the right priorities
3. Put technology in its proper perspective
4. Avoid shovelware
5. Make sure learners are ready
6. Make it timely
7. Make it real
8. If it's boring, they'll be ignoring
9. Less talking...more teaching
10. Get the user experience right
11. Match strategy to learners' experience levels
12. Provide for learning transfer
13. Innovate

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## Checklist and assessment tool: Scoring



- Circle "1" if, in your best judgment, there has been *no attention* paid to this question and/or there is *no way* you could even answer this question.
- Circle "2" if, in your best judgment, while you are likely aware of the importance of this question, you are pretty sure your answer to this question would be "no."
- Circle "3" if, in your best judgment, you have paid attention to this question and you are working hard to answer it, but *at least some of the time*, you are *unsure* if your answer would be "yes" or "no."
- Circle "4" if, in your best judgment, you have been working hard on this question and are *more likely than not* to answer "yes" to this question.
- Circle "5" if, in your best judgment, you have pretty much mastered this question and *almost always* can answer "yes" to this question.

**Base your judgments on how things really are now,  
not how you'd like them to be.**

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 6

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



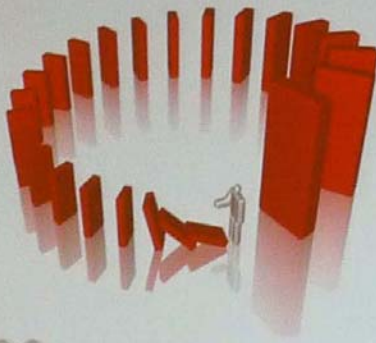
## 1. Begin with the end in mind



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 7

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



“If you don't know where  
you're going, any place  
will do.”

from Alice in Wonderland



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 8

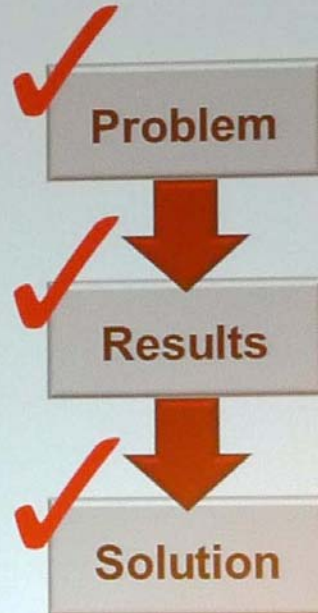
ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 1. Begin with the end in mind



“If you don't know where you're going, any place will do.”

from Alice in Wonderland



marc.rosenb

Building E-Learning That People Will (Really) Want to Use  
 ©2012 by Marc J. Rosenberg, all rights reserved  
 Page 10

ASTD 2012  
 INTERNATIONAL  
 CONFERENCE &  
 EXPOSITION

## 1. Begin with the end in mind

Who is the client?



The person who pays!

marc

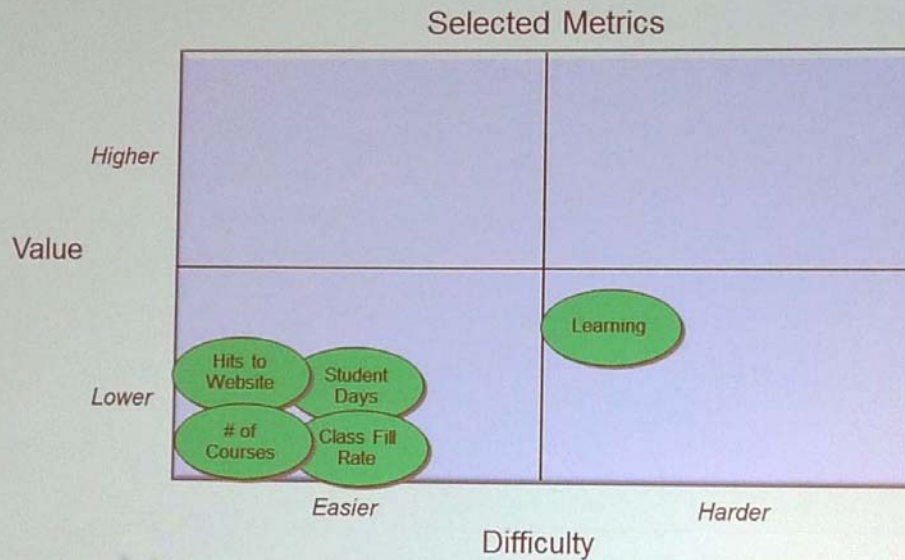
Building E-Learning That People Will (Really) Want to Use  
 ©2012 by Marc J. Rosenberg, all rights reserved  
 Page 11

ASTD 2012  
 INTERNATIONAL  
 CONFERENCE &  
 EXPOSITION



## 1. Begin with the end in mind

What results are important to the client?

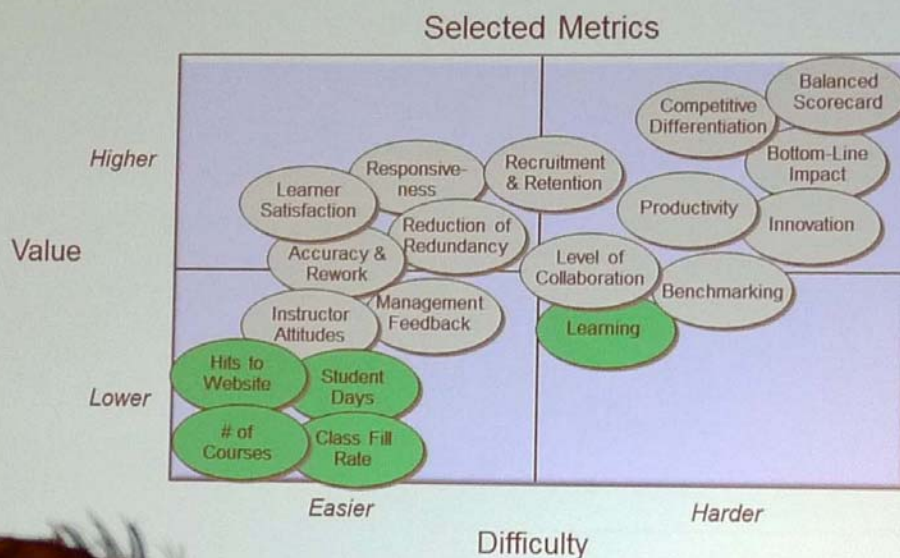


Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 12

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 1. Begin with the end in mind

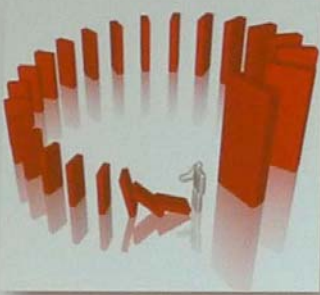
What results are important to the client?



Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 12

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 1. Begin with the end in mind: Three questions



1

Have you identified the *real* client?

2

Do you know what the *client* says constitutes success?

3

Do you know how success will be *measured*?

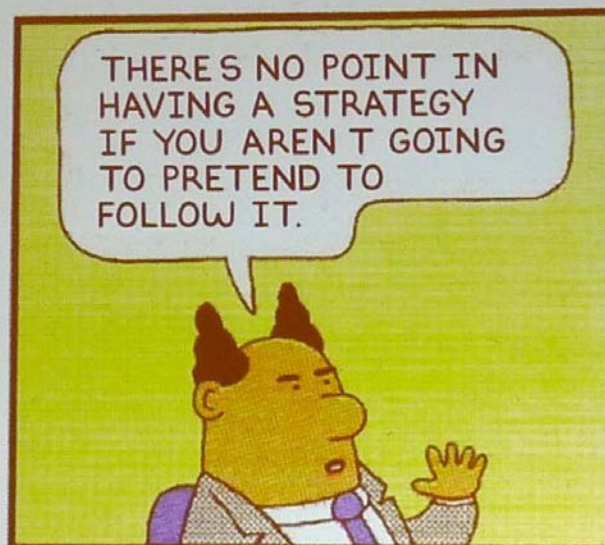
marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 13

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 2. Focus on the right priorities

Align with Strategy



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## 2. Focus on the right priorities

Make Critical Choices



Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 16

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 2. Focus on the right priorities: Three questions



1

Have you determined what is critical, and what is not?

2

Do you know how many critical priorities you can handle?

3

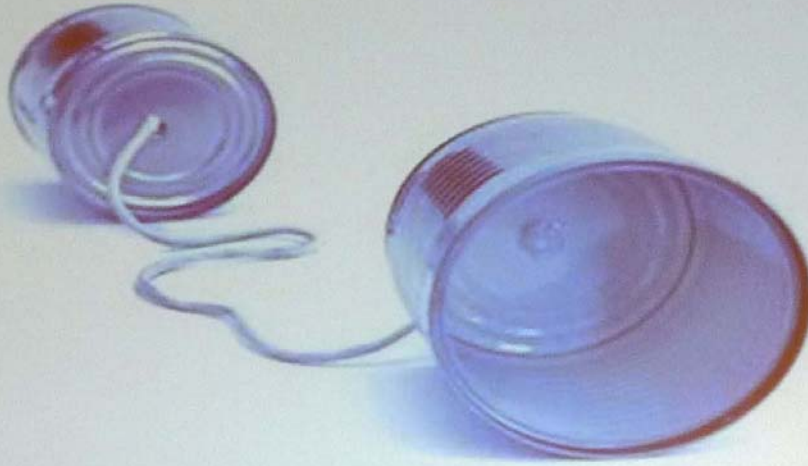
Is there consensus?

marc.rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 17

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

### 3. Put technology in its proper perspective

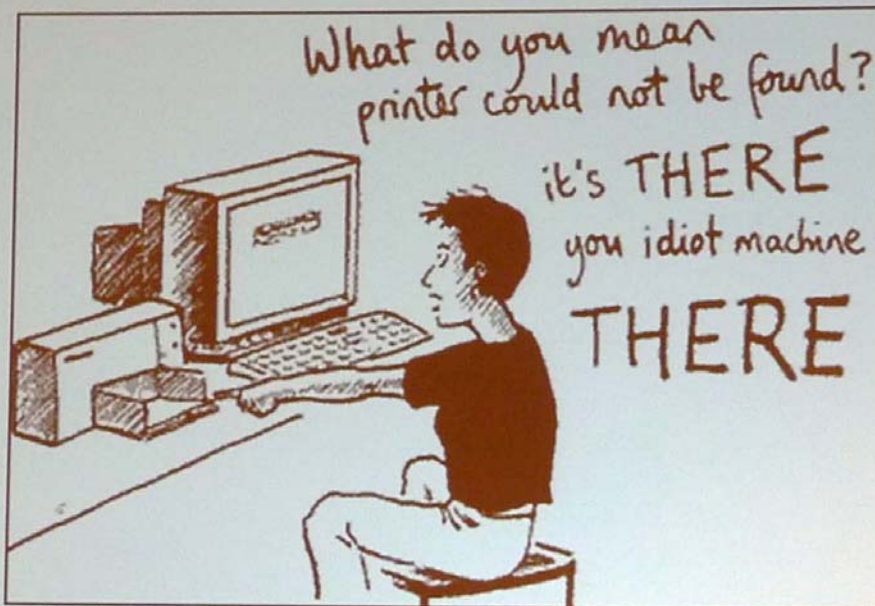


marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 18

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

### 3. Put technology in its proper perspective



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 19

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



### 3. Put technology in its proper perspective

*Technology helps keep everyone informed. It extends reach and access. It helps accelerate learning and makes it personal. It supports knowledge sharing and creates institutional memory.*



marc.rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 20

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

### 3. Put technology in its proper perspective

*Technology helps keep everyone informed. It extends reach and access. It helps accelerate learning and makes it personal. It supports knowledge sharing and creates institutional memory.*

But keep in mind...

- When technology fails, the initiative fails, but when technology works, there's no guarantee that the initiative will succeed.
- End-users require sound infrastructure; sound infrastructure needs valued end-users.
- Bandwidth breeds sizzle; sizzle breeds bandwidth.
- When technology gets easier to use, it also gets easier to misuse.
- Technology is not a strategy; it is an enabler.
- Support is a long-term proposition.
- Trainers are terrible managers of technology.

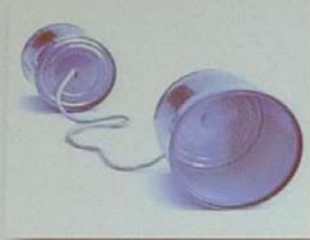
marc.rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 20

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



### 3. Put technology in its proper perspective: Three questions



1

Is your technology focus in balance?

2

Does the technology meet *critical* user requirements?

3

Is the program available anytime and anywhere?

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 21

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

### 4. Avoid shovelware

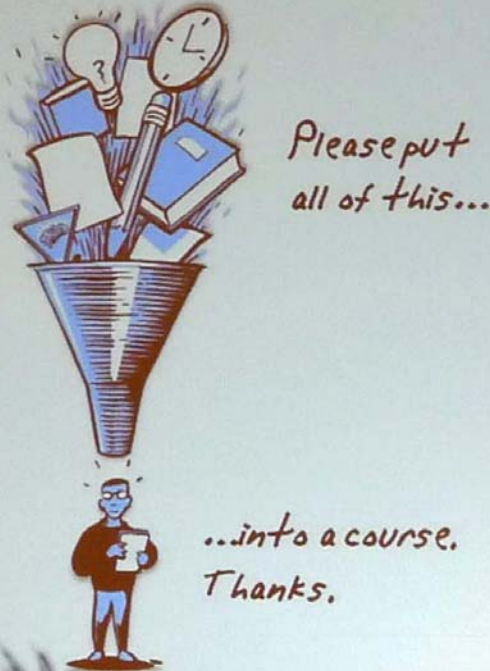


marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 22

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

#### 4. Avoid shovelware



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 23

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXHIBITION

#### 4. Avoid shovelware: Three questions



1

Have you determined if e-learning is even appropriate?

2

Is the course you are converting any good?

3

Are you taking true advantage of the medium?

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 24

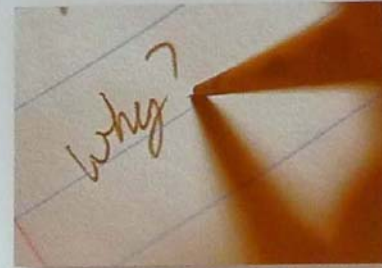
ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXHIBITION



## 5. Make sure learners are ready

Objectives are NOT enough

- ✓ Why am I here?
- ✓ What will I learn?
- ✓ Why is this important to me?
- ✓ Why is this important to my organization?
- ✓ What do I need to be ready?
- ✓ Will my boss support this training?
- ✓ What am I supposed to do when I'm done?



## 5. Make sure learners are ready: Three questions



1

Are the expectations clear?

2

Do learners have what they need to succeed *during* training?

3

Do learners have what they need to succeed *after* training?

## 6. Make it timely



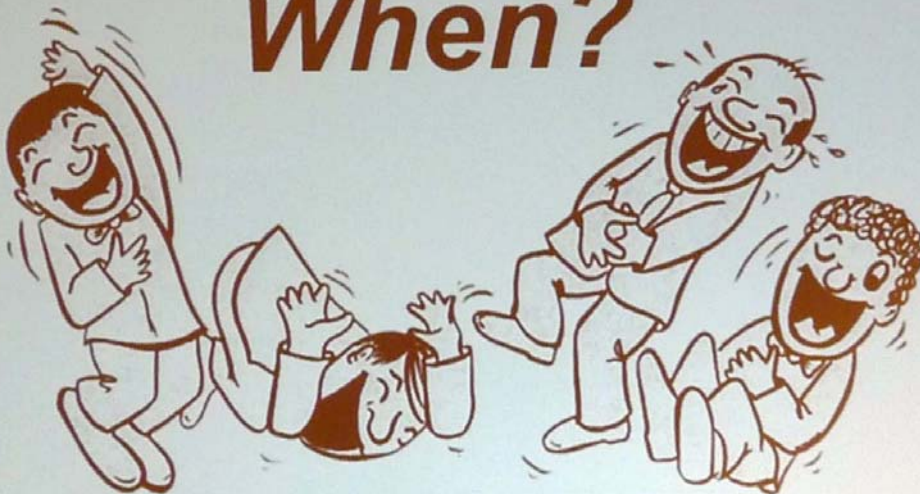
marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 28

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 6. Make it timely

You want it  
**When?**



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 29

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## 6. Make it timely: Three questions



1

Is the *need* timely?

2

Is the *content* timely?

3

Is the *availability* timely?

marc rosenberg

croenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 30

ASTD  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 7. Make it real



marc rosenberg

croenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 31

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 7. Make it real

*This course is going to teach frontline managers who use the ACME payroll system to edit employee time cards.*



I'm not a frontline manager.



*Your client knows what is being taught.*

*The learner knows if it is relevant.*

marc rosenberg

rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 32

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 7. Make it real: Three questions



1

Is the content correct?

2

Is the content authentic, and believable?

3

Are the examples "real world"?

marc rosenberg


rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 33

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## 8. If it's boring, they'll be ignoring

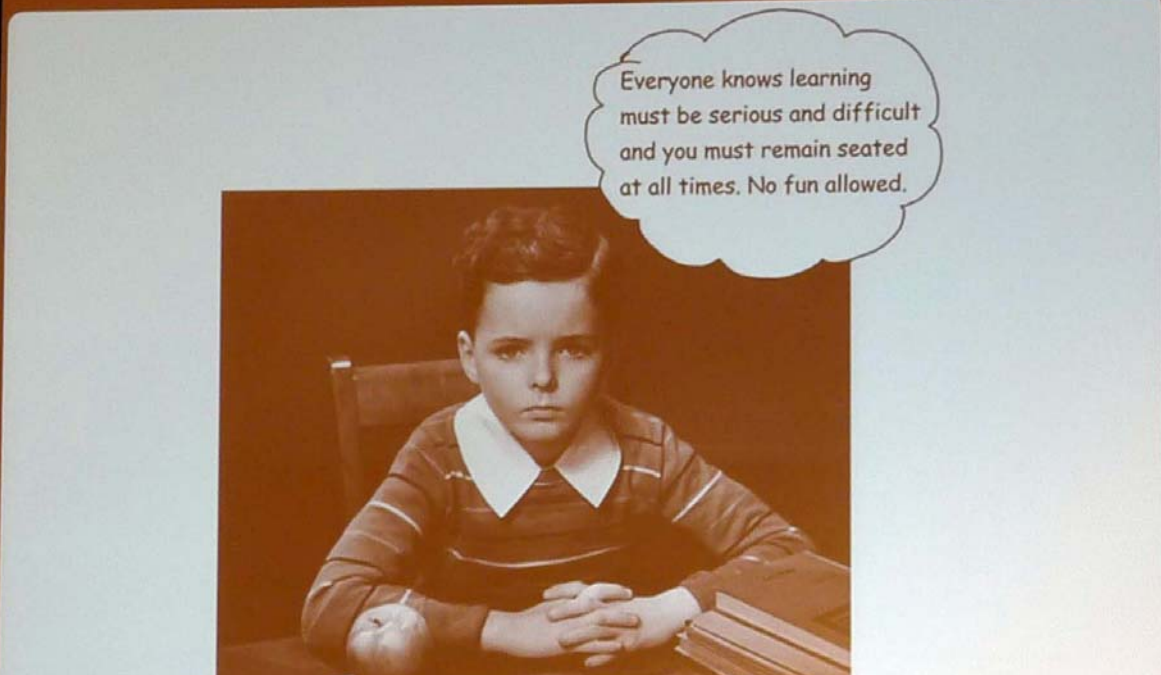


marc rosenberg  
rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 34

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 8. If it's boring, they'll be ignoring



marc rosenberg  
rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 35

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 8. If it's boring, they'll be ignoring

"I'm not lying! This was like nothing I'd seen before. It had rollovers and animations!"



marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 36

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 8. If it's boring, they'll be ignoring



“Learning does not happen as a result of interactivity - learning happens as a result of student reflection and integration of content into daily thoughts and work/life habits. Interactivity is a tool that (often) leads to this internalization of content.”

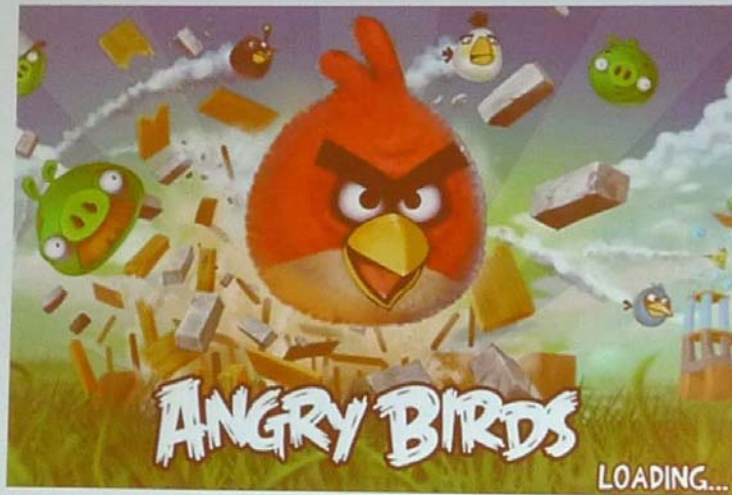
marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 37

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## 8. If it's boring, they'll be ignoring

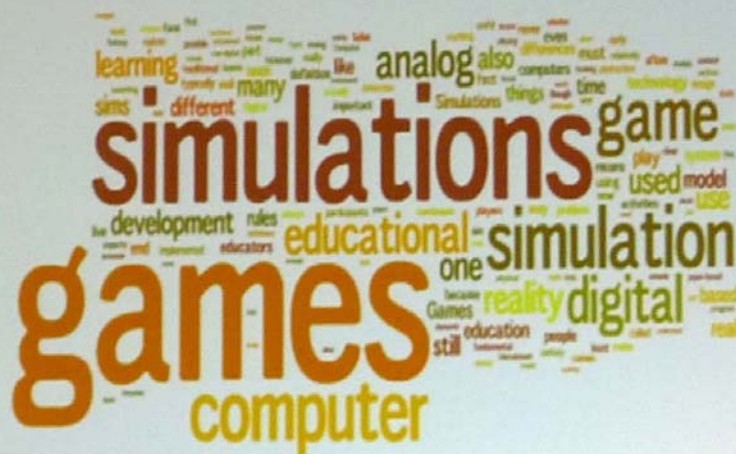


member

That People Will (Really) Want to Use  
Rosenberg, all rights reserved  
Page 38

**ASTD 2012**  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 8. If it's boring, they'll be ignoring



marc rosenberg

Will (Really) Want to Use

**ASTD 2012**  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## 8. If it's boring, they'll be ignoring: Three questions



1

Is the program important to the learners?

2

Are the interactions realistic, challenging and meaningful?

3

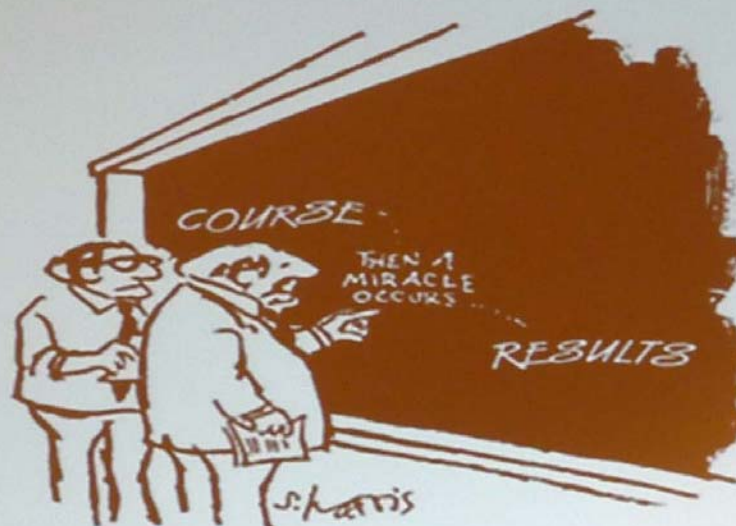
Is the program appropriately motivating?

marc.rosenberg

E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 9. Less talking...more teaching



"I think you should be more explicit here in step two"

marc.rosenberg

E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 41

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 9. Less talking...more teaching

### Balanced Instruction



**Explain**



**Exercise**



**Evaluate**

marc.rosenberg

rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
 ©2012 by Marc J. Rosenberg, all rights reserved  
 Page 42

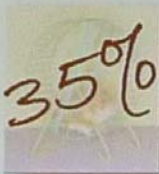
ASTD 2012  
 INTERNATIONAL  
 CONFERENCE &  
 EXPOSITION

## 9. Less talking...more teaching

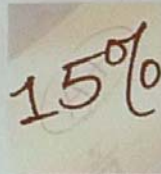
### Balanced Instruction



**Explain**



**Exercise**



**Evaluate**

marc.rosenberg

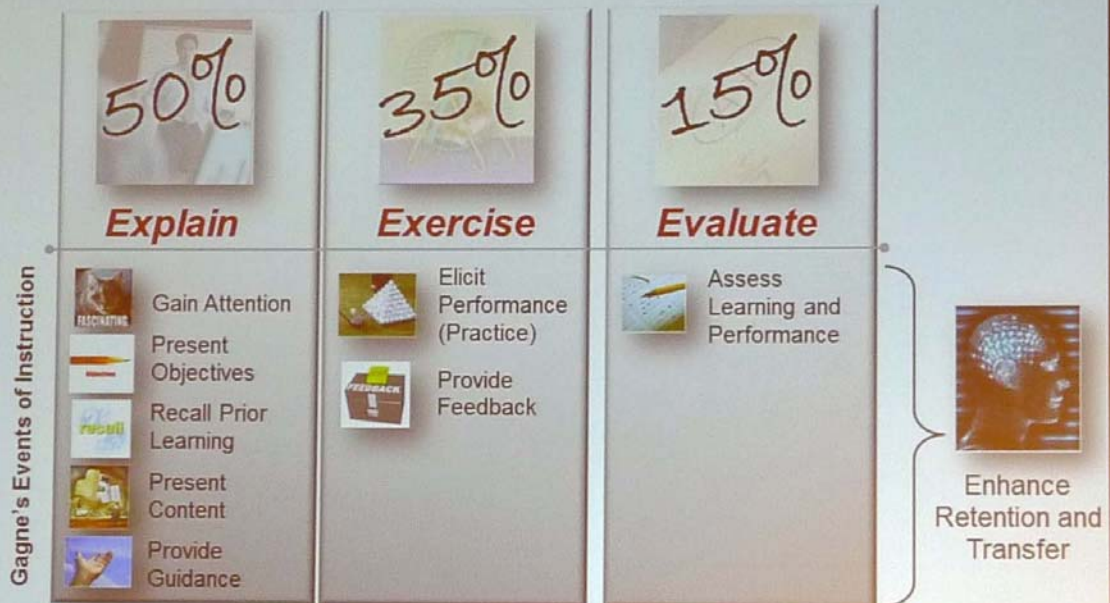
Building E-Learning That People Will (Really) Want to Use  
 ©2012 by Marc J. Rosenberg, all rights reserved  
 Page 42





## 9. Less talking...more teaching

### Balanced Instruction

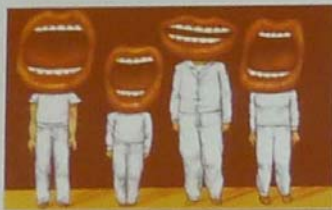


marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 42

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 9. Less talking...more teaching: Three questions



1

Is the program balanced? (explain, exercise, evaluate)?

2

Are there adequate & enriching opportunities for practice?

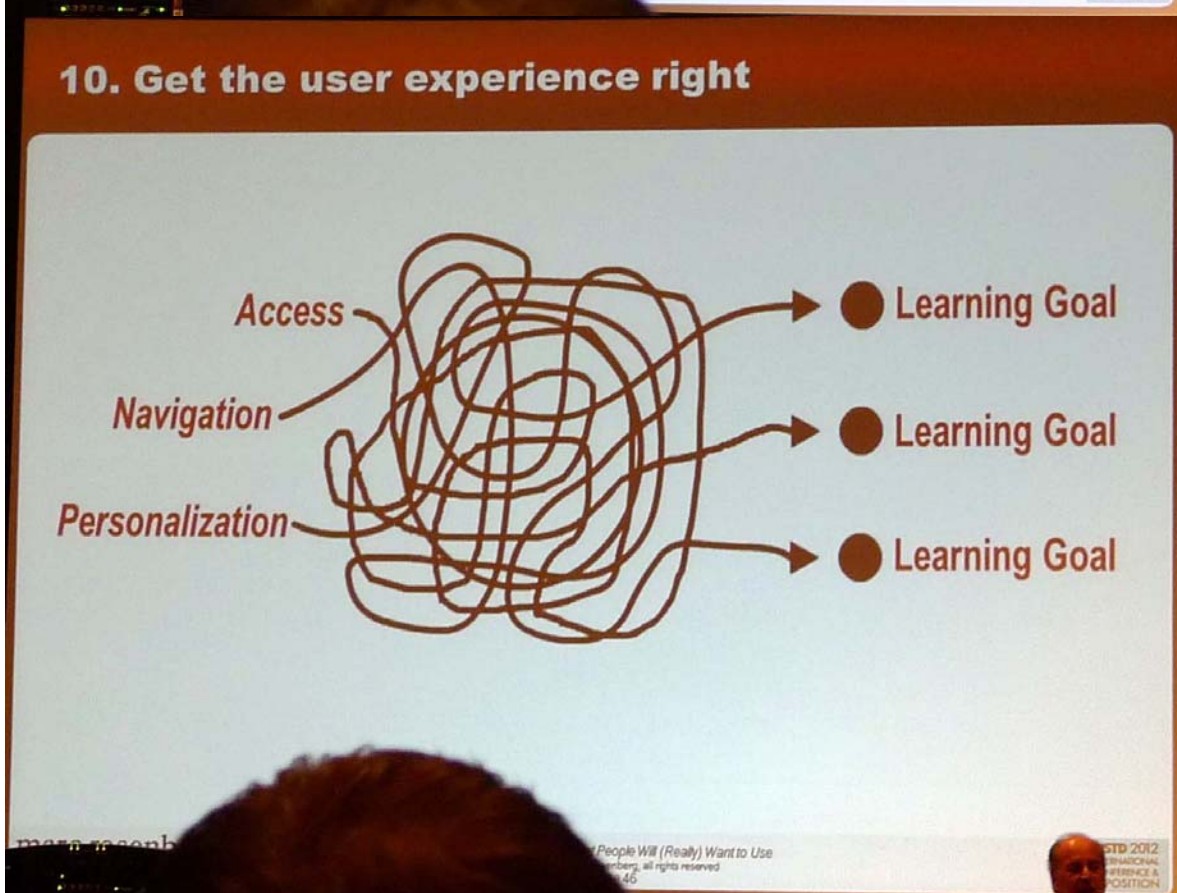
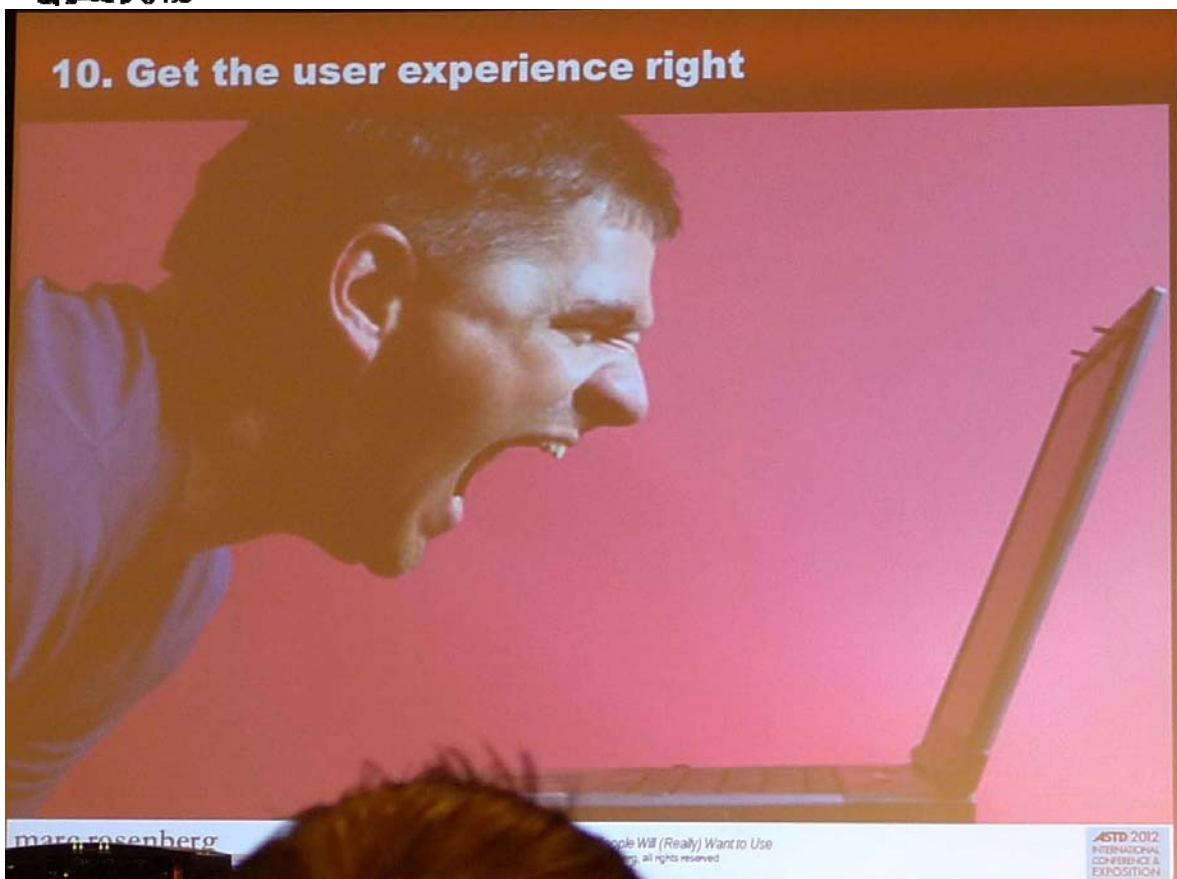
3

Is the feedback robust?

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 44

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION





## 10. Get the user experience right: Three questions



1

Is program access pain free?

2

Is navigation effortless and effective?

3

Can the program be personalized?

marc rosenberg

rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 47

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 11. Match strategy with learners' experience levels

### Novice

New to Job;  
Knows Little

### → Competent

Can Perform to Basic  
Standards

### → Experienced

Can Vary Performance  
Based on Unique Situations

### → Master/Expert

Can Invent New, Better Ways  
to do Job; Can Teach Others

Primary Strategy:  
Education & Training  
(Classroom and Online)  
"Show Me How"

Primary Strategy:  
Practice, Coaching  
"Help Me Do It Better"

Primary Strategy:  
Access to Knowledge &  
Performance Resources  
"Help Me Find What I Need"

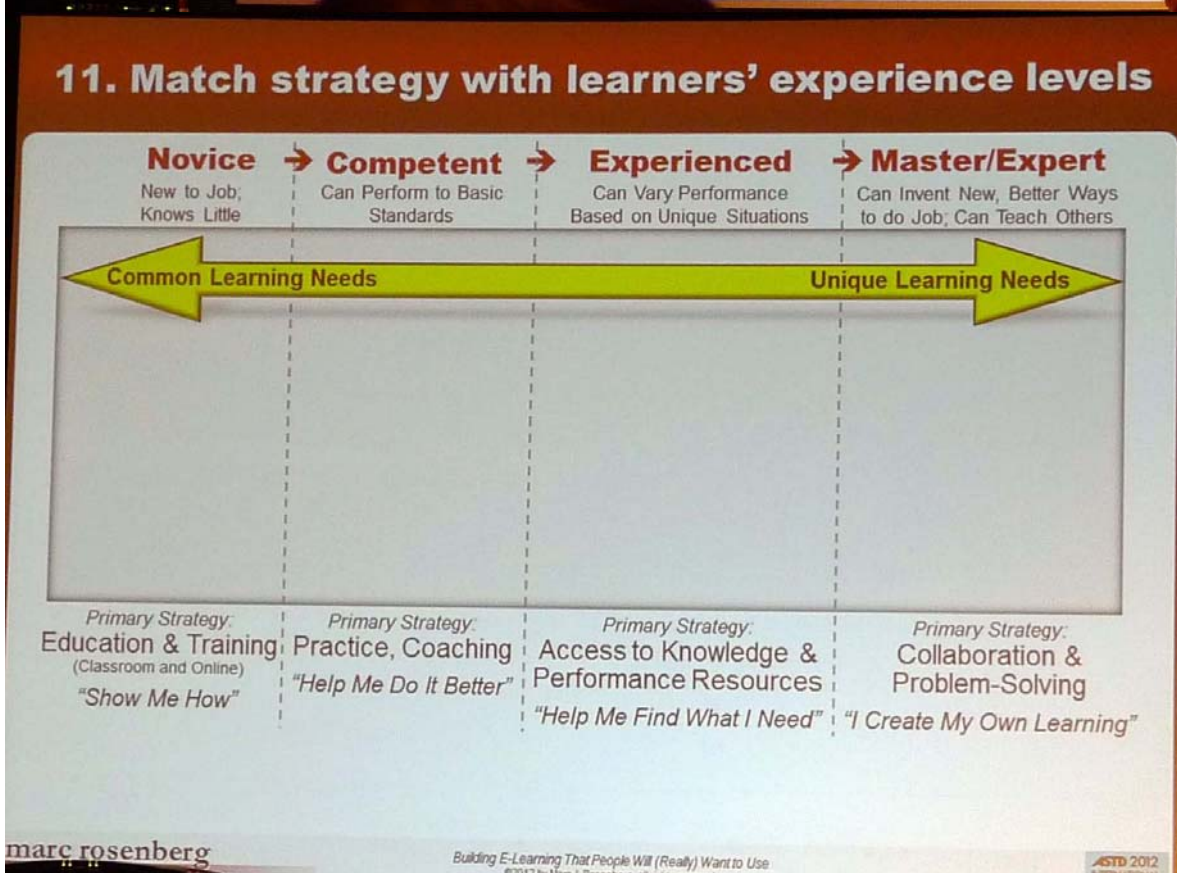
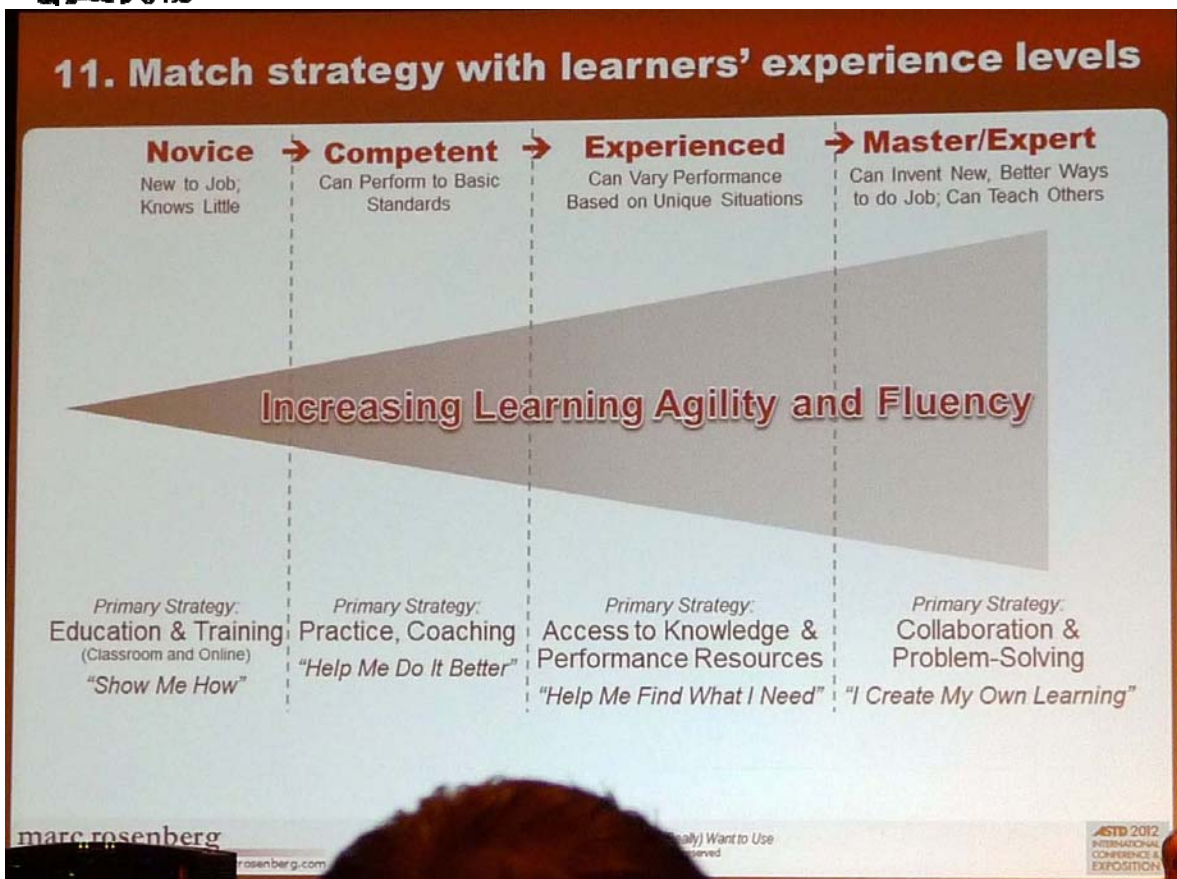
Primary Strategy:  
Collaboration &  
Problem-Solving  
"I Create My Own Learning"

marc rosenberg

rosenberg.com

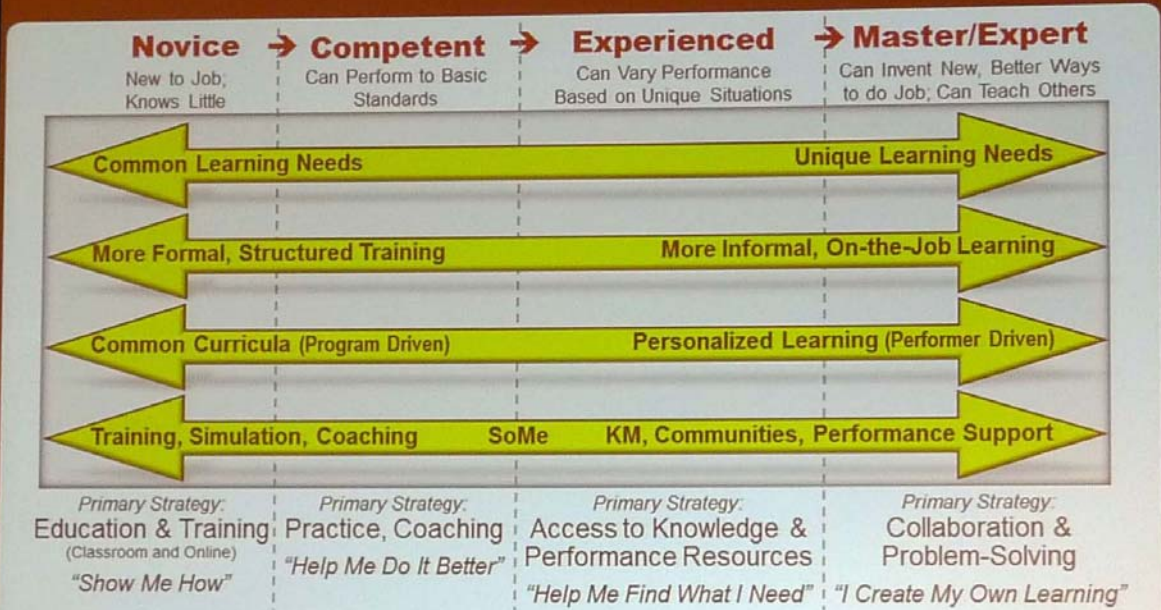
Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 49

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION





## 11. Match strategy with learners' experience levels



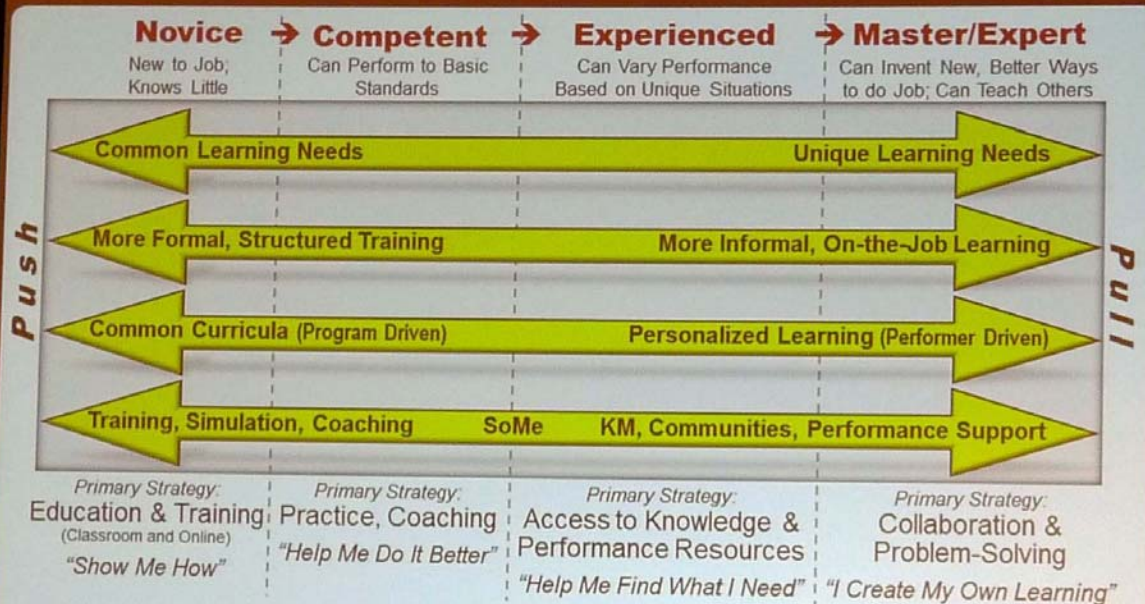
marc rosenberg

rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 11. Match strategy with learners' experience levels



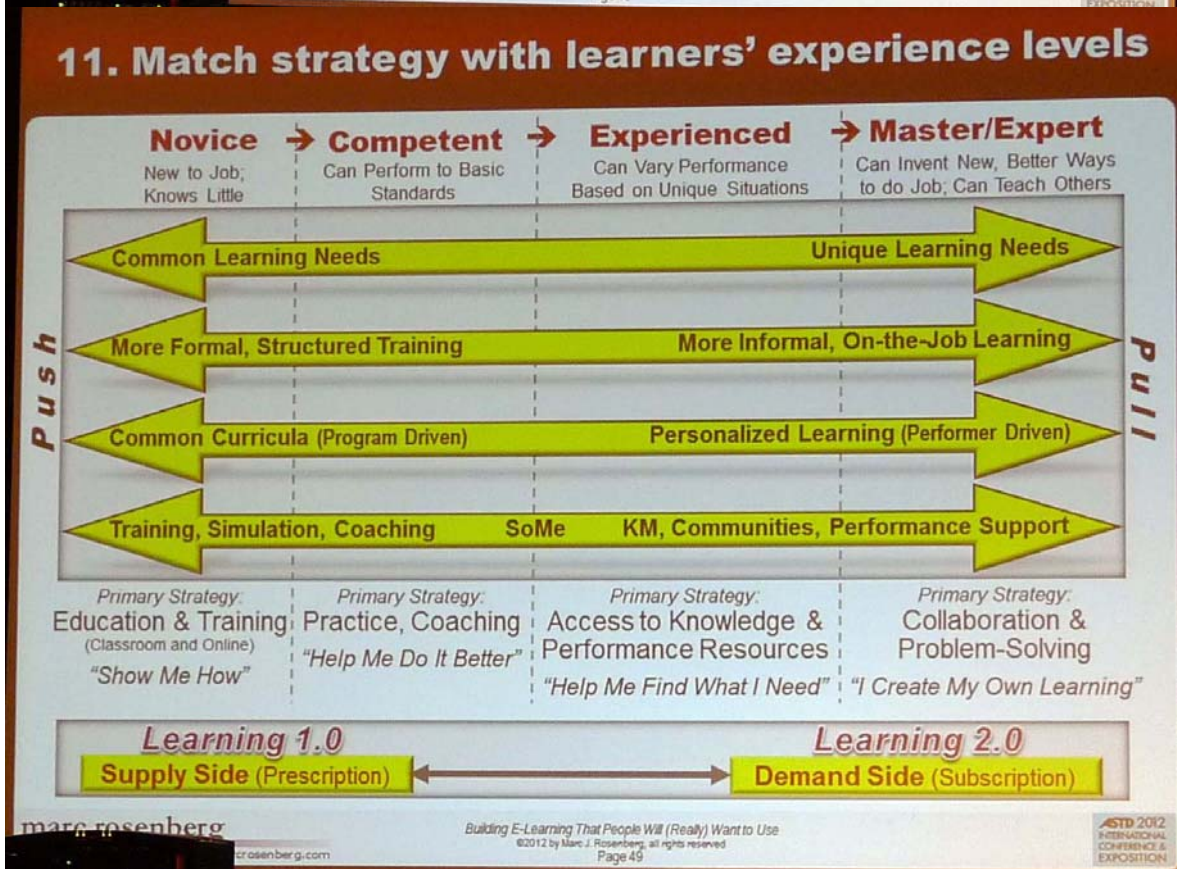
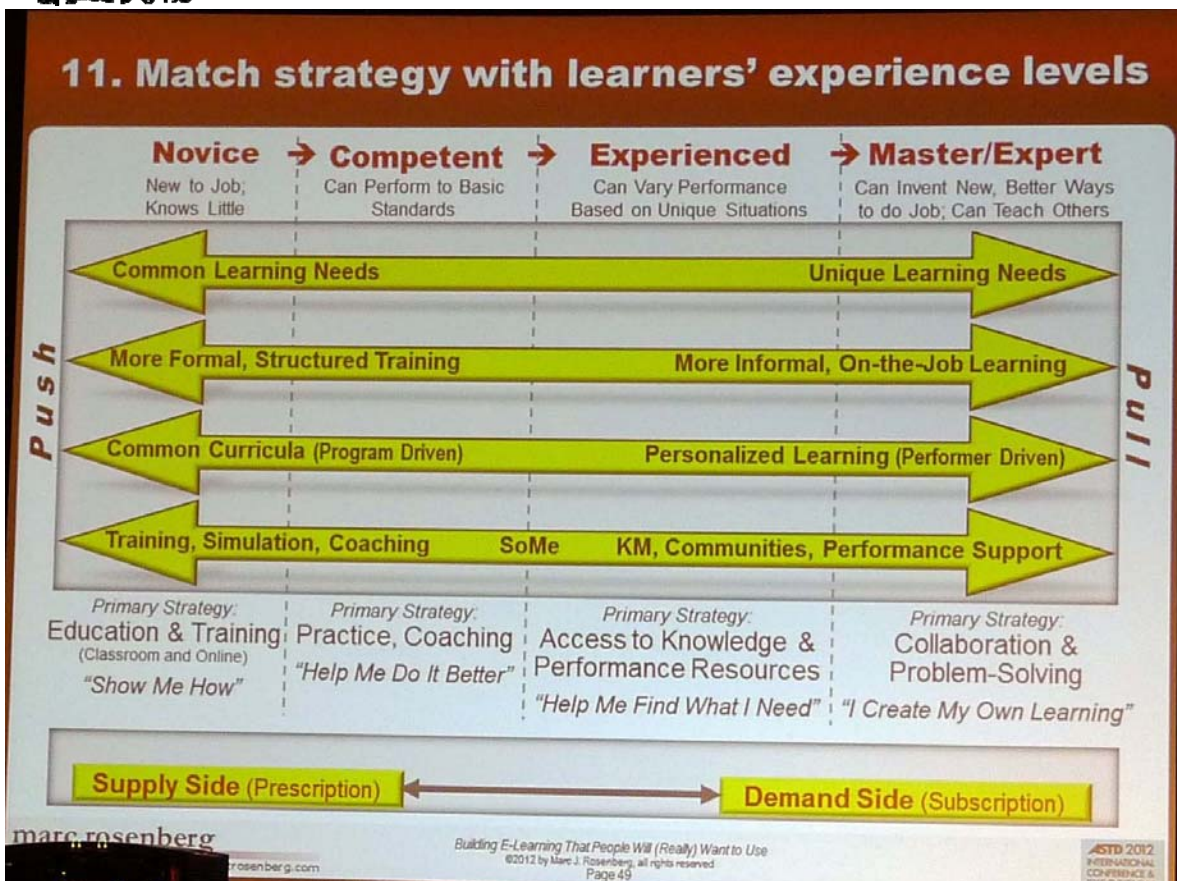
marc rosenberg

rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 49

ASTD 2012  
INTERNATIONAL  
CONFERENCE







## 11. Match strategy with learners' experience levels: Three questions



1

Do you know where the learners are on the novice – master scale?

2

Do you know how strategies are aligned to experience levels?

3

Are you using “push” and “pull” approaches appropriately?

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 50

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXHIBITION

## 12. Provide for learning transfer

USELESS..

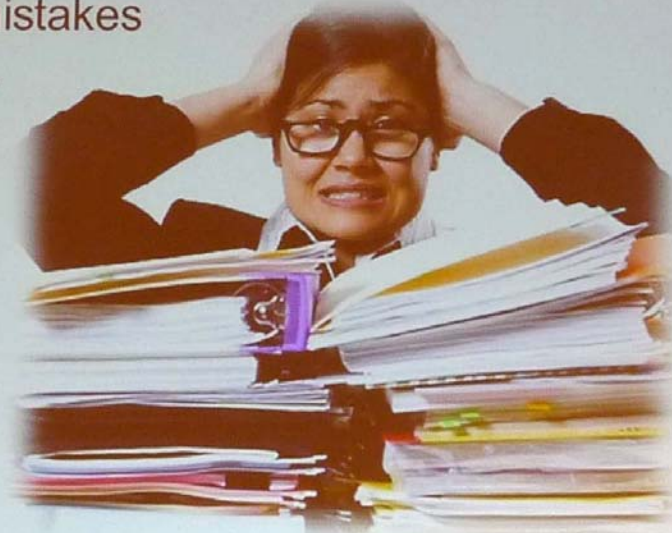
marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXHIBITION

## 12. Provide for learning transfer

Don't repeat the mistakes  
of the classroom...



“So many binders, so little value.”

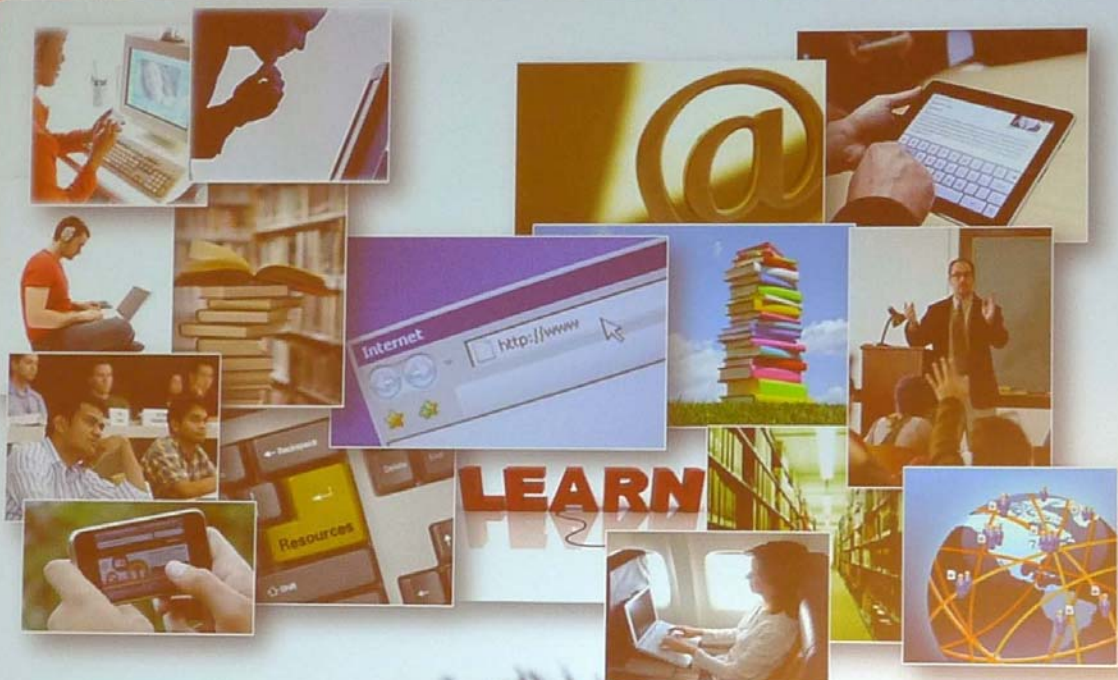
marc.rosenberg

rosenberg.com

That People Will (Really) Want to Use  
rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 12. Provide for learning transfer



marc.rosenberg

rosenberg.com

That People Will (Really) Want to Use  
rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## 12. Provide for learning transfer: Four questions



1

Is learning well integrated into work?

2

Are the proper tools and resources available on the job?

3

Is knowledge sharing strongly supported in your organization?

4

Do learners know how to learn on their own?

marc.rosenberg

marcrosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 55

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

## 13. Innovate



marc.rosenberg

marcrosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

### 13. Innovate



*"What do you mean  
our training  
program is  
outdated? We all  
went through it!"*

marc.rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 57

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION

### 13. Innovate: Three questions



1

Is the organization  
(and its people) open  
to new ways to learn?

2

Have you identified the  
resistance you are  
likely to get?

3

Do you have a long-  
term plan to support  
this change?

marc.rosenberg

rosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 58

ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



## Finding the "sweet spot:" A baker's dozen approaches to building great e-learning



1. Begin with the end in mind
2. Focus on the right priorities
3. Put technology in its proper perspective
4. Avoid shovelware
5. Make sure learners are ready
6. Make it timely
7. Make it real
8. If it's boring, they'll be ignoring
9. Less talking...more teaching
10. Get the user experience right
11. Match strategy to learners' experience levels
12. Provide for learning transfer
13. Innovate

marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc Rosenberg. All rights reserved.

ASTD 2012

## Checklist and assessment tool: Results



### Other Cautionary Signs

## CAUTION

- ✓ Very low score on any of the 13 focus areas, or
- ✓ Very low score on any of the 40 individual questions


marc rosenberg

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc Rosenberg. All rights reserved.

ASTD 2012  
INTERNATIONAL  
CONFERENCE



**Building great e-learning takes time...and a strategy**




*“ Good decisions come from wisdom.  
Wisdom comes from experience.  
Experience comes from bad decisions.”*

~ Anonymous

marc rosenberg  
marcrosenberg.com

Building E-Learning That People Will (Really) Want to Use  
©2012 by Marc J. Rosenberg, all rights reserved  
Page 62



ASTD 2012  
INTERNATIONAL  
CONFERENCE &  
EXPOSITION



參加美國訓練與發展協會(ASTD)2012 年國際年會報告書