Introducing Just-in-Time Training: Training at the Moment of Need

Keeping Employees in the Workflow & Increasing Productivity with Better Performance Support Tools
You know the importance of employee development. By providing rich, ongoing learning opportunities, you not only keep employees engaged and skilled but also ensure your organization stays agile, innovative, and profitable. To that end, you provide blended, on-demand, social, and even collaborative learning tools to help employees fulfill both their own goals and the organization’s.

Have you considered what happens when your employee can’t remember how to perform a key task? Productivity drops to zero. You may be providing your employees many opportunities to improve skills, further their careers, and build commitment to the organization, but how are you helping them solve challenges within the workflow?

Consider this scenario: Your employee has attended onboarding sessions and completed key learning modules. She regularly participates in forums and collaborative learning opportunities. She also has frequent performance reviews that, in turn, generate new development plans—and new skills. As a result, she’s engaged, continually learning, and committed to doing her job well.

Yet, one day, she’s in the middle of a key task—and she’s stuck. It’s been a year since her onboarding session and maybe even a month since her last online class. She either can’t remember how to do the task or needs a reminder of the task’s order or priority. She needs additional information to complete the task—and she needs it now.

So she turns to the performance support tools you’ve provided. You might even have her use your new knowledge base—a search bar at the top of her laptop screen—to find the answer.

However, none of these tools solve her problem, that of needing an answer right now, within the task, without disrupting her workflow. Instead, her only option is to stop working (and stop productivity) and go on a quest to find the answers she needs.
Defined as “any learning modality, resource, or asset that is accessible and applicable at the moment of need,” performance support (PS) tools are designed to help ensure ongoing competence within a job.

Yet for your stuck employee, a PS tool—be it an online help knowledge base, on-demand video within your LMS, or even a sticky note—isn’t the best solution in this case. Why? Because each of these PS tools take your employee out of the workflow and away from productivity.

Accessing the knowledge she needs in that instant is a multi-step, time-consuming process:

1. She must first decide which PS tool to use to find the right answer — video, PDF, knowledge base, etc.
2. Then she needs to leave her current work environment to log in to a new screen.
3. Once she has identified which resource to use and accessed that resource, she still needs to come up with the right search terms to find the right answer.
4. After the search yields the most targeted results, the employee then skims the resources to find the one that might best answer her question.
5. Finally, she needs to read the PDF or watch the video to learn the task.
In a best case scenario, this process takes 10 minutes. Worst case, it’s another 30 minutes—or even an hour—before your employee is back to work. And these estimates don’t take into consideration the additional time it takes to regain her train of thought and momentum within the task.

Research statistics show the time wasted is far more serious: according to a study by Interact, almost 20% of an employee’s business day is spent looking for information needed to do their job.\textsuperscript{ii}

A survey by SearchYourCloud showed employees required eight searches to find the right information; the same survey found the average worker in both the US and the UK spent up to 25 minutes hunting for the right piece of information or document.\textsuperscript{iii}

The problem is that existing PS tools aren’t built into the workflow itself. They do provide access to information. But their accessibility depends on a number of steps performed outside of the task being done. And while your employee experiences lost time and productivity—and increased frustration and distraction—the consequences to your organization are more severe.

When hundreds (or even thousands) of employees have to search for answers to their immediate work questions and challenges, the organization loses minutes, and then hours, of productivity. Consequently, the organization stays at the level of a learning organization and cannot transition to a performance organization.
Being in the “Now” Is for More Than Just Meditation

MIT mathematician, computer scientist, and educator Seymour Papert once said, “You can’t teach people everything they need to know. The best you can do is position them to find what they need to know when they need to know it.” In the past decade, performance tools fulfilled this directive.

But today we have to do better. In the coming decade, keeping employees productive and focused will require more than simply pointing them in the right direction.

Instead, employees must be provided work environments that promote less distraction and offer more help to keep them in the “now,” namely, in the moment of work. The better solution is not making employees find what they need to know but giving them information in the moment they need it.

In practice, this means anticipating what employees might need to know in the course of their work and building learning into the workflow itself with an electronic performance support system (EPSS).

An EPSS operates via just-in-time triggers, prompts built into the system itself that activate when an employee performs a certain action. The system anticipates what training an employee might need based on his or her own actions within the work environment, and help is delivered automatically in the moment of need.

There’s no need to leave the work environment, perform a search function, or make judgments about which resource will best solve the problem. Because the EPSS enables the employee to learn within the context (and moment) of the task, there’s no threat to existing productivity.
An EPSS Isn’t New—but the Technology Is


Gery thought that current training methodologies were “based on a set of fallacious assumptions from public education in the 19th century” and that group training was no longer effective because of growing “work complexity and instability of knowledge.” Instead, she saw the goal of an EPSS as “filtering resources so people get the tools and resources they need while actively working.”

Gery also knew from her own research and experience that the best time to learn was during the activity itself. This is partially because it puts knowledge into practice immediately but also because there is a “heightened interest” in the task at the moment of need.

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More recently, consultant Conrad Gottfredson has identified an EPSS as a crucial tool to help shrink the gap between competency in training and competency on the job. An EPSS fits Gottfredson’s stipulation that, for learning to be effective in the moment of need, information should be accessible in two clicks, and employees should be able to act on the information within 10 seconds. Gottfredson created the “Five Moments of Need,” a framework designed to help identify when employees need more performance support, namely when:

- Gaining a new skill (the Moment of New),
- Learning more (the Moment of More),
- Applying knowledge to act on what has already been learned (the Moment of Apply),
- Solving a new challenge (the Moment of Solve),
- Changing skills formerly used in performance practices to meet new standards (the Moment of Change).

While an EPSS can be helpful at every moment of learning, Gottfredson found it particularly useful at the Moment of Apply and the Moment of Solve. At the Moment of Apply, employees need help performing a task in that minute. An EPSS will use triggers to automatically deliver learning tailored to the current task, enabling the employee to apply the learning immediately, without a loss in productivity.

An EPSS is also crucial in the Moment of Solve. In today’s increasingly complex work world, merely applying learned knowledge to a task isn’t effective; employees today need to know how to adapt that knowledge to solve problems that weren’t learned in formal training.

While in 1991, when Gery suggested than an EPSS could revolutionize training and productivity, the technology to do so was still limited. Today, organizations can build and activate thousands of triggers to prescriptively deliver training based on an employee’s activity or change in status.
How Can “In the Now” Training Work for Your Organization?

By providing performance support within the workflow—and keeping employees “in the now” of their work—your organization can not only improve productivity but also agility and innovation. With an EPSS, the use of triggers creates a seamless, intelligent system that will be your employees’ most called-upon resource with the least amount of disruption.

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By embedding learning management and training triggers into the Salesforce platform, Cornerstone helps your organization provide “in the now” training to your employees, partners, and customers. Learning and task help is available from within a user’s workflow—and natively within Salesforce.

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