ELC 087: What You Can Steal From Marketing to Improve Training

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Connie: Hello, learning people, and welcome to episode 87 of the eLearning Coach podcast. Learning design is a crazy Venn diagram of so many fields. One of these fields that we don't hear much about is marketing. Marketers use strategies, tactics, and technologies that can transform the work of L&D teams and individuals.

And here to share with us some ways to think differently about your work are Bianca Baumann and Mike Taylor, who co-wrote the book Think Like a Marketer, Train Like an L&D Pro.

Bianca Baumann is vice president of learning solutions and innovation at Ardent Learning. She has developed innovative L&D approaches, including workforce transformations, onboarding, and reskilling programs. Bianca teaches Learning Experience Design at the Ontario Institute for Studies in Education.

Mike Taylor consults on learning design and technology at Nationwide in Columbus, Ohio. He has over two decades of real-life, in-the-trenches experience designing and delivering learning experiences. He is a regular and highly rated speaker at industry events and is a faculty member in Franklin University's Graduate Instructional Design and Technology program. Mike holds an MBA and a master's degree in educational technology.

Connie: Bianca and Mike, welcome to the E-Learning Coach podcast. Thank you so much for having us.

Bianca: Yeah, great to be here.

Mike: Thanks for having us.

Connie: I really like your book. Think Like A Marketer Train, like an L&D Pro, so I'm so happy to have you here. All I could think about was, well, it's about time because you've been teaching this for quite a while, so that's great. In case people haven't really thought about marketing and learning development, what are the parallels that you see between the two fields?

Mike: If we think about it, most people can probably come to this somewhat intuitively, but both marketing and L&D are trying to do some of the same things. And the two big things they're both trying to do are capture people's attention in a very noisy world and get them to think and act in new ways. And we would propose that a lot of times marketing is going about that very differently and often more effectively than most typical L&D people.

Connie: So, what inspired you to really explore it and to teach it? What gap and lack did you see?

Mike: So, both Bianca and I have spent time in marketing organizations, and I think there were events for both of us that we talk about in the book that sort of sparked this idea of the overlap and the connection of the two fields. And we met in 2017 on a learning guild, one of their virtual conferences. We each had sessions and then we shared a session on a conference ending panel and we both sort of had the idea of we're thinking similar things and we should sort of collaborate in some form or another. And then I'll let Bianca jump and add her thought.

Bianca: Yeah, thanks Mike. Yeah, that was really the starting point of our story there in 2017, and then we decided to submit a speaking proposal at DevLearn to really formalize this a little bit more. And so yeah, about two and a half years ago we're like, okay, it's time to put all of this into a book. But yeah, from an inspiration perspective, as Mike was just saying, I worked for a marketing automation software or company and I was teaching marketers how to be better marketers and I was just in awe on how well they're doing all of this. And I was mainly on the strategy and tech side of things and data analytics and whatnot. And so the book is really also combination of a whole bunch of strategy pieces to it and then very tactical actionable takeaways as well. And I think that's just what excites me and it inspire me about marketing too. They're just so good with the upfront strategy and then really getting into the tactical details because often in L&D we skip that strategy piece because we're just reacting not all the time.

Connie: So, for people who aren't super familiar with marketing, what are the goals of marketing?

Mike: I'll jump in and take a crack at that. So, we mentioned earlier goals of getting attention and influencing behavior. It really sort of aligns really well with L&D as well of we're trying to build awareness, we're trying to engage audience, and then marketers are converting that interest into a purchase or something, some sort of outcome like that. And L&D we're trying to convert people into learning. And then ultimately the ultimate goal is applying that on the job for organizational goals.

Bianca: It's that behavior change. It's kind of that parallel for me. And we're already saying marketers are often doing it much better. To be fair, marketers also often have more budget if we do to play with, and they have much more or better ways to measure the return on investment or ROI on what they're doing. And that's also definitely an area where we can learn a lot and where there's a lot of parallels in my mind to just be much more data driven.

Connie: So, in the book, you offer strategies for both system one, intuitive thinking and system two deliberative thinking. Can you briefly explain Kahneman's work and give a few ways to leverage both types of thinking and learning situations?

Mike: Yeah, absolutely. So, Daniel Kahneman wrote a book called Thinking Fast and Slow, and he sort of popularized this idea of a dual processing theory, which is that we have two thinking systems. The system one is fast and intuitive versus system two is slow and deliberative. A lot of things are happening in our minds subconsciously via that fast intuitive system that we're not aware of consciously. And it's a huge influence on the things that we do and how we process information. So, for integrating that into learning designs, for example, though we start with intuitive thinking, it's things like using compelling visuals and story making, emotional connections, keeping your messages simple and concrete, personally relevant. Those are all things that our intuitive mind will naturally pay attention to. And then for the deliberative thinking side, things that a lot of instructional designers are probably already trying to do. Things like breaking down complex topics into digestible chunks, providing time for reflection, practice, and application and using structured problem-solving activities and using both of those things to improve attention, retention, and memory application, things like that. So, those two types of thinking ideally would work together hand in hand.

Connie: Did you want to add anything, Bianca?

Bianca: I have nothing to add there apart from the attention piece, right? I think that for me is the biggest takeaway to really think about how we can grab someone's attention and really focus in on our target audience for that.

Connie: So, let's move on to personas. Now, many people in our field are creating learner personas I've discovered, and they do it during their audience analysis. What can we learn from marketing though to improve the usefulness of our personas?

Bianca: Yeah, I think the starting point, as I just mentioned briefly, it's like grabbing the attention of people as Mike was just talking about the two different systems. But once we understand how the brain works, then it's so much easier for us to say, okay, now I need to add that second piece to, it's like who are the people I'm actually talking to? Because we all have different preferences and ideas. And so, marketing is doing a fantastic job in being much more research-based than we are with our personas. And often we just do a quick putting something together, quick assumption, and then we move on. The other thing that we can learn from marketing is to actually use them. And this might sound so obvious, Connie, but I've seen so many projects where we create these personas, possibly even research-based, which takes a lot of time and effort, and then they just gather dust in some virtual corner because no one is coming back to them and actually using them throughout the design.

And I think that is just a big lesson there for sure. And yeah, use the persona for the overall program level and strategy, but then as we're just saying, also really be much more tactical when you write for a specific persona, how does the voice change based on the research we've done? Are they more into intensive training so we can have a little bit more long form content? Are they in a sales role and it needs to be quick and dirty, so small short snippets. So, I think that part is really, really crucial. So, research-based, but also making sure you're using them.

Connie: What do you do in the case of very large audiences, when you're making training for an entire organization like HIPAA training at a hospital, do you then create a persona for every audience group?

Bianca: That's a great question and it's a challenging question as well. So, what I would do in that case is start with segmentation. So, segmentation is the step you do before you create a persona. And what you do in that step is you look at your entire target audience and then you identify what are specific segments. That could be departments, that could be geographic locations, that could be individual contributor versus managers. And then within those segments you now create multiple personas. So, you're really looking more broadly and then breaking it down. I love the example you gave me here, Connie, because you should always have a larger program that initiates the learner persona creation because as I said, it takes time and effort. So, if you only have to create a one hour training, it makes no sense. But if you have a larger program, it just works really well. And then my rule of thumb is usually about three to five personas to get started, but it depends the size of the organization. So, you might need a couple more, but for each persona I would usually interview between 10 to 15 people like learners, and then another five to eight managers to just have some good data to work with.

Connie: That sounds great. Do you see any common errors that people make when they're creating personas in L&D that you haven't mentioned yet?

Bianca: Yeah, I think one thing, just keeping top of mind is stereotypes and biases, making sure we're staying on the right side of this. And with the rise of ai, we see more and more of that because unfortunately AI is still a little biased at times, so you really got to catch that if you use AI to analyze and synthesize the information. But yeah, just be mindful of that to make sure all of your learners are represented as much as possible.

Connie: And I think it's great to not make any assumptions. We really have to look at the data. How about we move on to writing? That's one of my favorite topics. I was so happy to see a section on writing in the book. What writing techniques can course designers borrow from marketing to engage audiences?

Mike: Well, I think writing is like a superpower and it doesn't always get the credit or the attention that it deserves. So, I'm happy to hear that you think that way about it as well. One thing that you'll see as a common thread through all of this is the learner centricity of everything. So, the first thing that is an enormous help is if you have learned about your audience using personas or whatever analysis you've done, that's going to be a huge help to the way you write. Having that knowledge of those people. I think a common challenge for a lot of people, and I've been guilty of this as well in the past, is I just want to jump. People want to jump to creating content. And if you do that, it's content focused and it's not people focused and you're missing a lot in that process.

So, things that you can do when you're writing first and foremost is understand your audience as well as possible, but then once you get into it, lead with the benefits and not features. So, I use this example, you're doing training for let's say an expense reporting system. The employees who are submitting them don't need to know the same things as the managers who are approving them. So, the context is different. And that's the kind of thing personas can help you understand using clear conversational language. So, probably heard the advice of write the way you talk. That's a big one. Headlines are really important. I think another thing that doesn't get attention, 80% of the people will read your headline, but only about 20% will read the rest. And it's all based on that title or headline. So, those are important. So, that's kind of getting people into your content, making it scannable. So, if it's a longer, depending on the format, being able to use headlines and white space and graphics to carry some of the message. And then things as simple as adding a call to action at the end. So, make it very painfully clear what you want people to do and make a call to action, which all good marketers do. So, those are some simple things that anybody could start doing and apply that to their writing right away. Can

Connie: You give an example of a call to action in a training program so that the audience can understand what you're talking about?

Mike: We use a fictional company sort of throughout the book. It's a luxury kitchen equipment, lux kitchens, and we've actually got an example of that in there. So, let's say we're doing a sales presentation webinar instead of the call to action is register now. Well, okay, well that's pretty generic and we don't know. The call to action could be something like improve your close rate with brain-friendly presentation, failed techniques, something like that. It gets to what's the benefit. They can see why they're coming. They can see benefits of doing this training, tapping into the relevance. Maybe there's an emotional piece to that if that's something high on their priority lift and things that they're trying to do. It's something that I learned along the way because I really never gave it any thought. And you just think, okay, learn more, register now that doesn't really say much. And so if you can speak to the way our brains process information, you'll see better results.

Connie: Have you seen common mistakes that course designers make in writing?

Mike: Oh gosh, lots of them. And I will say I used to make these as well though, using jargon, technical language. Anybody that worked any company of any size probably have acronyms coming out their ears, writing formally, this is one when I was early in my career, we sort of model what we've seen. So, if it's academic and formal that we've seen in school, that's what we do. Make it personable. Don't make it too dense, too dry. And another thing is you can talk about serious subjects and have some personality and have a little fun along the way. And my experience has taught me that people appreciate that it's different. It's not so boring and dry and try to connect to some emotional aspect. Why do people care about what you're talking about and try to tap it into those emotions.

Connie: Those are great. And the first book I wrote, I was so academic because that's what I came from all of us. I remember the editor was sending me back pages and she just wrote, huh. And that was the biggest lesson for writing just huh?

Mike: My story is similar with when I first started working at Articulate. The first blog post I wrote, and I was super excited, and I sent it to Tom Kuhlmann who was my boss, and it was less than two seconds, and it came right back. And I think he hit Zs across the subject line, like it's boring. And he was talking about the title, well, why would I read it if Nobody cares. And so that was a huge thing. I'm like, oh yeah, I get it. If you're scanning all this stuff, nobody's going to read it.

Connie: It's a slap in the face. It's really funny. Those are the good lessons.

Mike: Absolutely

Connie: Onward to learner journeys. So, I think anyone who's experienced the field knows that one-time intervention is not enough. And I know we have problems with organizations accepting longer term courses and journeys, but can you talk about the benefits of designing learner journeys rather than just these one-time interventions? Yeah, absolutely.

Bianca: First off, a learner journey is steps that a learner will go through to accomplish an overall goal. And so there are much bigger than our, I want to say our standard training program. So, I want to go back to the example we used that Mike just used with our sales consultants at our kitchen lux organization. So, if you look at a sales consultant and business situation could be, oh, revenue is down year over year. So, our business goal is to increase revenue year over year, and that is what the learner journey has to work towards. And there's of course all kinds of learning and performance objectives along the way, but ideally, once we hit all those learning and performance objectives, we will see an increase in revenue. Obviously it's not just training that plays into this, but hopefully when someone went through training, we actually see an increase, not a decrease.

It's really like the different tasks. That's how I like to think about it. The different touch points someone goes through. So, for that salesperson, it would be lead management, right? There would be something along the lines of kitchen presentations, and then there's the negotiation and closing the deal and customer advocacy, whatnot. So, it's very big and it's very strategic. So, I just want to kind of put that definition out there before I answer your question, Connie. So, the advantage of that, you probably kind of heard that already, is it's a strategic way for learning and development to tie our efforts in learning and development to the business, which is something we're not necessarily always doing a good job with. And this way we can actually speak the business's language so we can identify what is the business need, why do you need this training, right? Well, you need this training because your revenue is done. Okay, that's a good reason for me. Oh, I need this training because I just feel like it today. That's not a good reason. So, really tying it back, and this is for me where it's so much better to think holistically about what else needs to happen versus these quick interventions. It doesn't mean you can't have quick interventions, but you need that first step, that learner journey to understand where it fits in the bigger picture and how it feeds into the business overall.

Connie: So, in the book, you mentioned mapping out goals, touch points, interactions and channels. How did they come together into a learning journey?

Bianca: Yeah, let's go with that. The example of lead management as one of the touchpoints, right? So, again, touchpoint is kind of a lead management negotiations, like big buckets. And then you will kind of break that down further because now you want to think about, okay, for each touch point, what are the different elements someone needs to learn within that touch point? That could be lead management has to do with a customer relationship management system. It has to do with taking good notes, there's phone etiquette, there's email etiquette. So, all of that kind of fits in there. So, you then want to identify how different channels could help us get that content to our learners. So, that might be through the LMS, it might be through an internal social media platform. And then of course, within those platforms you have different content types, an e-learning module or a webinar or an AI coaching tool or whatever it might be. And then of course you kind of have your measurements for each of those pieces. So, that's kind of how it all flows together. That was the 32nd version. I think it takes about 20 pages in the book to explain that

Connie: That was good, having a completely holistic approach, and that may involve different lessons, different courses, different types of media. How can you make sure that it's all tied together and well-integrated?

Bianca: This is where I love the campaign and the learner journey approach because what marketers do really well is having an underlying communication strategy that also goes with all of this. And Connie, I know you will appreciate that a visual identity for all of this as well. So, not only from a content and context perspective, is it all tied in together, but you also have that visual recognition. It's like, oh yeah, this looks familiar. And I think that's something huge. We can learn from marketing to really tie pieces together. And it's our job to do that. We can't ask our learners to figure out how things fit.

And a strong communication of change management goes with this too, especially if you start implementing learner journeys and later on campaigns, which is more of the tactical piece to this. You can't expect learners to understand that there's multiple pieces to this if you've never done it before. So, that education piece of the learners managing expectations is extremely important.

Connie: Okay, great. Well then let's move on to learning campaigns and talk about them. So, how do they differ from learner journeys?

Bianca: Yeah, so the learner journey is that overall strategic flow of something that the learners have to go through in order to achieve that overall goal. And then if you think about each of the touch points, so again, lead management negotiations, closing the deal, that is your campaign, that's much more tactical. So, now you're like, as I mentioned earlier, phone etiquette, CRM, usage, whatever it might be.

And then you really kind of blow up what you had in your journey with your channels on your content types and whatnot, and be really, really tactical about, Okay, what are all the different interactions and assets I need? How am I going to design and develop all of these? How am I going to bring them out to the people? How do I measure all of this? So, it's really the execution of the learner journey plan per touchpoint.

Connie: You’re going deep into that one area.

Bianca: Absolutely. You got it.

Connie: Can you give an example of a successful learning campaign that you've seen or designed?

Bianca: So, one of my favorite examples is the overall learner journey was an onboarding program, so very strategic. And then within that we had knowledge about competitors. And originally it was a one-hour session. Everyone said great, here's our five competitors, good luck. So, especially for the salespeople, that was really hard because these salespeople have to be on the phone or answering emails about, oh, but your competitor does this or that, how do you compare? And they're like, I don't know, I'm new.

So, instead, what we did is we had an initial kickoff. There was about 20, 30 minutes, and everyone was in that meeting no matter if they were in sales or in marketing or admin, all the new hires, a kickoff meeting talking about, well, this is kicking off the campaign for competitor training. And then what we did is we used emails, and in the emails we had something that's called dynamic content.

Dynamic content means it changes content in the email based on the recipient's information. And in this case, it was the job role. So, what I mean by that is if you were in sales, you got very different content than when you were in marketing or an administrative assistant because an admin assistant, they just need to know, oh yeah, these are our competitors, but for sales, they need more meat. So, those emails were much more in depth and they linked out to resources and whatnot.

The tool we used at the time allowed us to see if emails were opened or not. So, if there were not opened, we could nudge send other emails. It was like, Hey, you didn't look at this yet. A manager nudging too. And so that went through for four to six weeks. And then we also, in week two or three, we added in a chatbot as well, which had its own campaign within the chatbot. And this was before AI was a big thing. And so we pushed out additional content through the chat bot, and learners could also ask what, how and why questions. So, that was really great for working learning in the flow of work while they're on a phone, right? They're like looking up information. And then we kind of had a final session where we brought everyone together to just kind of debrief on that experience. So, that's just one example of how a campaign and an overall onboarding program might look like.

Connie: That really sounds quite intensive and it sounds unusual for a company to allow someone to do that.

Bianca: Yeah, absolutely. This is a really good point, Connie, right? There's a lot of education needed internally to be able to work differently.

Connie: Absolutely. And think differently. One of your themes, so you mentioned the technology. Let's move on to that. What technologies do marketers use that would benefit L&D departments?

Mike: Oh my gosh, how many days do we have to talk about this? There's literally thousands and thousands of marketing tools and technologies that L&D could leverage. So, let's start off with Bianca's example of using email for a campaign approach, letting people personalize those messages, customize them dynamically. Like she mentioned, I'm a big fan of email marketing platforms. It might sound complicated and complex, but it's actually super simple to set up. So, you can deliver those messages based on time, geographic location, job book, all types of things. And if you know what you want to do, you could probably set something like that up, assemble one in an hour and have it run. So, that's the one thing here. Don't be intimidated by this step because some of them can get complex, but there are a lot are very accessible for anybody, and you don't have to be marketing or technology guru at all.

The email platforms also let you automate a lot of that delivery. So, I'm not setting at my keyboard and kicking these things off or typing the things manually every time we have an event or something that would trigger an email. There's the marketing automation tools in the book, we have a case study. Zapier is one of those tools, and their learning team actually use their own tools and automated scheduling, calendar invitations, communications, all these things that we all probably do internally. And they saved over a thousand hours of just what I call busy work time, sending emails, scheduling, making calendar invites, stuff like that. So, the automation tools are a huge benefit for everyone, no matter what type of work you do. Then we could get into more content focused things. So, there's some really great interactive video tools that are going to do things based on demographics of your learners or behaviors, things they do or don't do, all the way down to even event platforms.

So, probably a lot of training people use Zoom or some similar platform. There's a tool, a marketing tool called Luma, which will let you use Zoom or whatever platform you're already doing, but it will build a landing page with nice visual graphics. It'll even add notifications and follow-up messages. And really, you're just taking your webinar link and plugging it in and letting Luma sort of take over and manage. So, tons and tons and tons and tons of this, that L&D could adopt. And then most of these, and another thing we talk about is using data. So, what's working, what's not working, sort of informing your design choices. And a lot of these things you can pull data and get a sense of what's happening. So, for example, Bianca mentioned, I can see who did or didn't open the email, and if I've got a very important email and 99% of the people aren't opening it, okay, well maybe I've got a poor subject line. And you kind of get away from that black box challenge of not having idea of what's happening and start to let the data inform bloom your design.

Connie: What do you think some of the easiest to use email automation tools are?

Mike: So, one that I recommend that has a free version that's pretty robust that will let you do all of the automation features is mailer light. So, I think you get up to a thousand or maybe 2000 subscribers and you have the full featured of the whole capabilities in the pretrial. So, you can create these dynamic campaign. It's a really visual editor, so it's almost like dragging and dropping to make a flow chart. So, if they opened it, send that email, if they didn't send a different one, really easy to get started with and free for, like I said, up to a thousand or 2000. So, that's the one I would recommend people starting with if they wanted to play. Around.

Connie: About 10 years ago, I made an email course called Breaking into Instructional Design using AWeber and thousands of people. It's just about the career have taken that, and I meet people at conferences and they go, I took that course five years ago and now I'm an instructional designer. It was so easy. It was just writing an email and sending it on a schedule. It was like a no brainer.

Mike: It is. And the nice thing that you would also appreciate is people say email, and as you can see their reaction on their faces, they're like, oh, email. But the editors, it's almost impossible to make an ugly email using these platforms because it's made from blocks, and you drag them in and it's beautiful. It's not something you created in Outlook, which is ugly and horrible and all the bad things.

Connie: That's amazing. Are there AI tools that L&D can take advantage of to save time and effort when designing learning journeys and campaigns?

Mike: Oh, a hundred percent. And there feels like a fire hose of these things. So, there are things from content creation, assistance, writing tools, Grammarly, I'm a huge Grammarly fan, just to sort of help me with my punctuation and grammar and stuff. Analyzing data. So, if you've got, for example, you've done learner persona interviews, you've got all this data, you could apply some AI tool to analyze that and sort of help you find key points from that recommending learning. So, if you've got learner persona data and you want to set context for certain personas, it can help you with that. It can help you ideate what are the scenarios relevant to those things. It's almost an endless supply of things, and Bianca may have some others to add to that as well.

Bianca: I just use cloud or OpenAI, perplexity I like for just research. But yeah, I don't think it's one tool in particular. It just kind of combine them and to make sure they work for which you need.

Connie: Which ones do you recommend for

Bianca: Analyzing data? So, here at Ardent, we've been using OpenAI. I mean, on the free version, you can get one upload a day and very limited data I think. So, you do have to actually get a subscription for it, but we had some really good success with that. I mean, also always it depends on how good you're prompting and what you're looking for, right? The tool is only as good as you are with using the tool, but we've been using OpenAI quite a bit.

Connie: You're uploading spreadsheets or CSV files.

Bianca: Yeah, exactly. That's it. So, a while back we did some learner interviews and they're all virtual, so we actually transcribed everything in the moment. And then we used that information, obviously cleaned it up on any client mentions and whatnot, and then uploaded that to say, Hey, we want to create learner personas based on these interviews. Help me identify some trends, similarities. So, you have these initial buckets, and I would say time savings was probably by 30% compared to how I used to do it in the past with you have this massive Excel spreadsheet and now you've got to go through it line item by line item, right? But yeah, only 30% if you think about it that way, because you still have to go in and you still have to double-check things. And is that really the trend? And did you understand that? Right? But still 30%, right. It's good too.

Connie: Your book also provides strategies for stakeholder management and ways of looking at workforce transformations as part of thinking differently.

Bianca: Can you talk a little bit more about that? Yeah. I think that the driving factor here is thinking differently. If you think about big workforce transformation, that is really what's needed. So, I think our book really provides some enticing thoughts around that. But what was important to us was that we take that step back and be more strategic. I already talked about the learner journeys, for example, and the learner personas, but what you'll find in those chapters is okay, how do you educate everyone in your organization? How do you get stakeholders on board? I mean, going back to the learner persona specifically, I mentioned earlier, 10 to 15 interviews, roughly half an hour each. That's a lot of time away from work. We need buy-in in order to do that. So, we're providing strategies to help you educate, manage the stakeholders to help you be successful. Because if you don't do that upfront work, it's not going to work. So,that is really where the book helps as

Connie: Well. I think often people don't realize how much we have to educate internally and externaly. That's a good place for wrapping up. It was great seeing you. Thank you so much for your time. Thank you. You're most welcome.

Mike: Thank you, Connie, it's great to see you always.