

Portfolio Case Study



The work behind the value

The Client or Team

The client was a large financial services organization with a dedicated travel services division supporting a high-volume Travel Advisor environment.

The work focused on the **Learning & Development and Delivery team, which is** responsible for onboarding Travel Advisors. The organization was moving toward a more blended onboarding model, which required facilitators to shift how they supported learners.

My role was the Strategic Learning Consultant, supporting broader program design with a focus on the **Train-the-Trainer strategy and upskilling the delivery team.**

The goal was to help the delivery team build the confidence, consistency, and facilitation capability required to support a modern, blended, and performance-focused onboarding experience for Travel Advisors.

The Problem

The organization was developing a more blended onboarding program for Travel Advisors, and the delivery team needed to shift how they supported the learner experience.

The facilitator role was changing. Facilitators were no longer responsible for delivering 100% of the content in a traditional classroom model. Learners would now receive information through a mix of digital learning, facilitated sessions, practice activities, discussion, coaching, and application.

This created an important delivery risk.

When facilitators are used to owning the full content-delivery experience, it can be natural to reteach material that learners have already covered through digital or other learning activities. While well-intended, this can reduce the value of the blended model. It can also use up the live learning time that is most important for synthesis, problem solving, practice, discussion, and feedback.

The live, facilitator-led time needed to be protected for the moments when humans matter most: helping learners make sense of the information, explore how it applies to their role, ask questions, practise decision-making, and receive feedback.

This meant facilitators needed to build confidence in a different way of delivering. They needed to trust the full learning journey, understand what content was being handled through other modalities, and focus their time on helping learners apply what they were learning.

The challenge was to help the delivery team shift from **content delivery** to **learner enablement**.

This required capability in:

- blended learning delivery
- learner engagement
- coaching and feedback
- synthesis and discussion
- practice-based learning
- group facilitation
- application in the flow of work
- managing live session time with intention
- maintaining consistency across facilitators and cohorts

At its core, this was a **facilitator capability and delivery readiness challenge**: how to prepare the delivery team to confidently support a modern onboarding experience in which facilitator-led time was used for application, practice, feedback, and learner confidence — rather than simply repeating content delivered elsewhere.

From the first day of this T3 pilot program... I felt supported and prepared thanks to Carrie's precise methodology.

My Approach

I approached this as a **facilitator capability and change adoption challenge**, not just a Train-the-Trainer event.

The onboarding program was moving to a blended model, which meant the facilitator role needed to shift. Facilitators were no longer responsible for delivering all of the content. Their role became more focused on helping learners synthesize information, practise, problem-solve, receive feedback, and apply their learning to the Travel Advisor role.

The strategy was to help facilitators trust the full learning journey.

In a blended program, some content is introduced through digital learning, self-directed activities, or other modalities. The risk was that facilitators would use the time to reteach what had already been covered, rather than using it where their human value mattered most: discussion, coaching, practice, reflection, and application.

I designed the approach around three priorities:

1. Build a shared standard for facilitation quality

Facilitators needed a shared understanding of what strong delivery looked like in a blended environment, including learner engagement, group facilitation, coaching, peer feedback, and the creation of a safe space for practice.

2. Help facilitators experience the program before delivering it

The delivery team needed to see the program from the learner's perspective. This helped build trust in the design, the learning flow, and the role of each modality before they were asked to facilitate it themselves.

3. Shift the mindset from content ownership to learner enablement

The focus was to help facilitators understand that their role was not being reduced. It was becoming more important. Their value lay in helping learners connect the dots, ask questions, practise decision-making, and build confidence in applying what they learned.

A key part of the approach was helping facilitators read learning objectives through both the learner and facilitator lenses. We looked at the action verbs in the objectives to clarify what learners were expected to do and what facilitators were responsible for enabling.

The human lens was central to the strategy. Facilitators needed to feel confident, respected, and supported through the change. The goal was to help them bring their talent into a new model, while creating more space for learners to explore, practise, and grow.

Actions and Challenges or Constraints

To bring the strategy to life, I structured the work as a practical capability pathway for the delivery team.

Key actions included:

- **Designed a 3-day facilitation level-setting experience** to align facilitators on the core behaviours required in the blended onboarding model.
- **Focused the level-setting on practical facilitator behaviours**, including creating safety, managing group activities, supporting learner vulnerability, coaching through practice, giving feedback, and using peer-to-peer review.
- **Created a rolling Train-the-Trainer model** where facilitators experienced the program as learners before being expected to deliver it.
- **Used a Principal Facilitator** to role model professional facilitation, show how the blended program was intended to flow, and make facilitation decisions visible to the team.
- **Built daily coaching circles into the experience** so facilitators could prepare before the day began, then debrief and reflect at the end of the day.
- **Separated learner experience from facilitator debriefs** by holding program debriefs at the end of the day, rather than interrupting the learning flow after every activity.
- **Used the coaching circles to unpack facilitation choices**, including how the facilitator prepared, adjusted to learner needs, handled challenging moments, and supported engagement.

- **Helped facilitators identify what did not need to be retaught**, so live time could be protected for synthesis, practice, feedback, and application.
- **Used learning objectives and action verbs** to clarify what learners were responsible for doing and what facilitators were responsible for enabling.
- **Supported peer-to-peer review and continuous improvement**, helping the delivery team build a shared craft and improve together over time.

The biggest challenge was helping facilitators let go of the belief that strong facilitation meant covering all the content themselves. For experienced trainers, this was a real shift. They were used to being in control of the full delivery experience, and moving to a blended model required trust in the design, the digital components, and the learner's ability to come prepared.

Another constraint was time. Facilitators are needed to develop new behaviours while also preparing to deliver a new onboarding program. Capability building had to happen close to the work and not feel like a separate theoretical exercise.

There was also a consistency challenge. The organization needed facilitators to deliver the program with a shared standard, but not in a scripted or rigid way. The approach needed to protect the design intent while still allowing facilitators to bring their own style, experience, and strengths.

The rolling TTT, coaching circles, Principal Facilitator model, and peer feedback structure helped manage these constraints. Together, they created a practical way for facilitators to experience the program, trust the design, practise the role shift, and build confidence before leading learners through the blended onboarding experience.

Because of her sheer energy, delight and 'never say die' force of spirit, combined with her bottomless pockets of expert industry knowledge, craft and technique, she lifts every team of which she's a part above any rough waters.

Outcomes

The Train-the-Trainer strategy helped the delivery team prepare for a meaningful shift in how onboarding would be facilitated.

The goal was not only to prepare facilitators to deliver a new program. It was to help them build the confidence, consistency, and capability required to support a blended learning experience. Live facilitator-led time needed to be used where it mattered most: helping learners synthesize information, practise, problem solve, receive feedback, and apply what they were learning to the Travel Advisor role.

The work strengthened facilitator readiness, protected the intent of the blended program design, and supported a more consistent onboarding experience across cohorts.

Key outcomes included:

- **80% of facilitators completed the 3-day facilitation level-setting experience** before entering the program-specific Train-the-Trainer.
- **25% of facilitators completed the initial rolling TTT pathway** and were prepared to support the blended onboarding launch, with the remaining facilitators scheduled to complete the rolling TTT in the flow of work as future cohorts launched.
- **Facilitator readiness/confidence reached 95%** after the TTT experience.
- **Learner satisfaction or onboarding experience ratings reached 87%** for the blended onboarding program.
- **Travel Advisor readiness or confidence improved by 40% compared** to previous operational survey results.
- **Time to readiness for new Travel Advisors improved by 30%**, based on initial review and feedback from operational leaders.
- **55% of live session time shifted to practice, application, coaching, and discussion**, rather than repeating content already delivered through digital or self-directed learning.

The broader outcome was a stronger delivery model. Facilitators were better prepared to trust the blended design, protect live time for application, and support learners through the moments where human facilitation mattered most.

At the business level, this helped protect the onboarding investment. The organization was not only launching a new blended program; it was building the facilitator capability needed to deliver it consistently and confidently across cohorts.

In practical terms, this work strengthened facilitator readiness, improved delivery consistency, and created a more sustainable onboarding model where Travel Advisors could build confidence and role readiness through digital learning, live facilitation, coaching, and applied practice.