

# How to Facilitate Informal Learning through Collaborative Portals

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*Informal learning should no longer be regarded as an inferior form of learning whose main purpose is to act as the precursor of formal learning; it needs to be seen as fundamental, necessary and valuable in its own right. (Coffield, 2000)<sup>1</sup>*

## Introduction

What role does informal learning play in your organization? More and more often, it has become the predominant talent development approach. When asked how career development and learning occurs, most organizations cite some variation of the 70-20-10 model: 70% of learning occurs informally and implicitly on-the-job through experience, tasks and problem solving; 20% occurs through relationships, feedback and working with role models; and only 10% of learning takes place in the formal programs and classrooms.<sup>2</sup>

One of the great challenges to the application of the 70-20-10 model is enabling and supporting the 90% of learning that is informal in nature. To address this challenge organizations increasingly are turning to collaborative portals and content management systems created with tools such as Microsoft SharePoint.<sup>3</sup> This solution supports informal learning in the following ways:

- Enabling easy access to information, various types of content, experts and role models
- Supporting collaboration with team members that enhances networking and relationship building
- Managing the content that supports informal learning and the production of critical job/role outcomes.

Many of the organizations that implement portals and content management systems assume that appropriate usage and informal learning will naturally follow. Unfortunately, this may lead to collaborative portals that fail to meet goals for adoption and usage. The result—poor sharing of knowledge and information, eroding commitment, and meager workforce support for informal learning.

The purpose of this article is to describe informal learning and share three techniques organizations can apply to facilitate informal learning and enhance the ROI achieved through collaborative portals and content management systems.

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<sup>1</sup> Coffield, F. (2000) *The Necessity of Informal Learning*, Bristol: The Policy Press.

<sup>2</sup> Lombardo, M. and Eichenger, R. (2000). *The Career Architect Development Planner*, 3<sup>rd</sup> edition.

<sup>3</sup> SharePoint is now the fastest growing product in Microsoft's history.

## What is Informal Learning?

Informal learning has been described in many ways. Broadly, it is implicit, opportunistic and unstructured learning that takes place in the absence of an instructor or classroom. It also has been defined more narrowly as learning which takes place in the work context, relates to an individual's performance of their job and/or their employability, and which is not formally organized into a program or curriculum.<sup>4</sup> Perhaps it is best defined by Eraut's typology of non-formal learning (Table 1).<sup>5</sup>

**Table 1. Michael Eraut's Typology of Non-Formal Learning (2000)**

Time of Stimulus	Implicit Learning	Reactive Learning	Deliberative Learning
<b>Past episode(s)</b>	Implicit linkage of past memories with current experience	Brief, near spontaneous reflection on past episodes, communications, events	Review of past actions, communications, events, experiences  More systematic reflection
<b>Current experience</b>	A selection from experience enters the memory	Incidental noting of facts, opinions, impressions, ideas  Recognition of learning opportunities	Engagement in decision making, problem solving, planned informal learning

As Table 1 describes, faced with a new assignment or task, informal learning can be implicit, reactive, and/or deliberate. That is, the learning can be an *implicit* linkage of past memories, followed by a selection from experience that is transferred from long-term to short-term memory. Learning may also be described as a *reactive*, spontaneous reflection of past experiences, enhanced by a noting of facts and recognition of learning opportunities. Finally, it may be *deliberative*, exemplified by conscious, systematic review and reflection of previous experiences, followed by intentional decision making, problem solving, and planned informal learning.

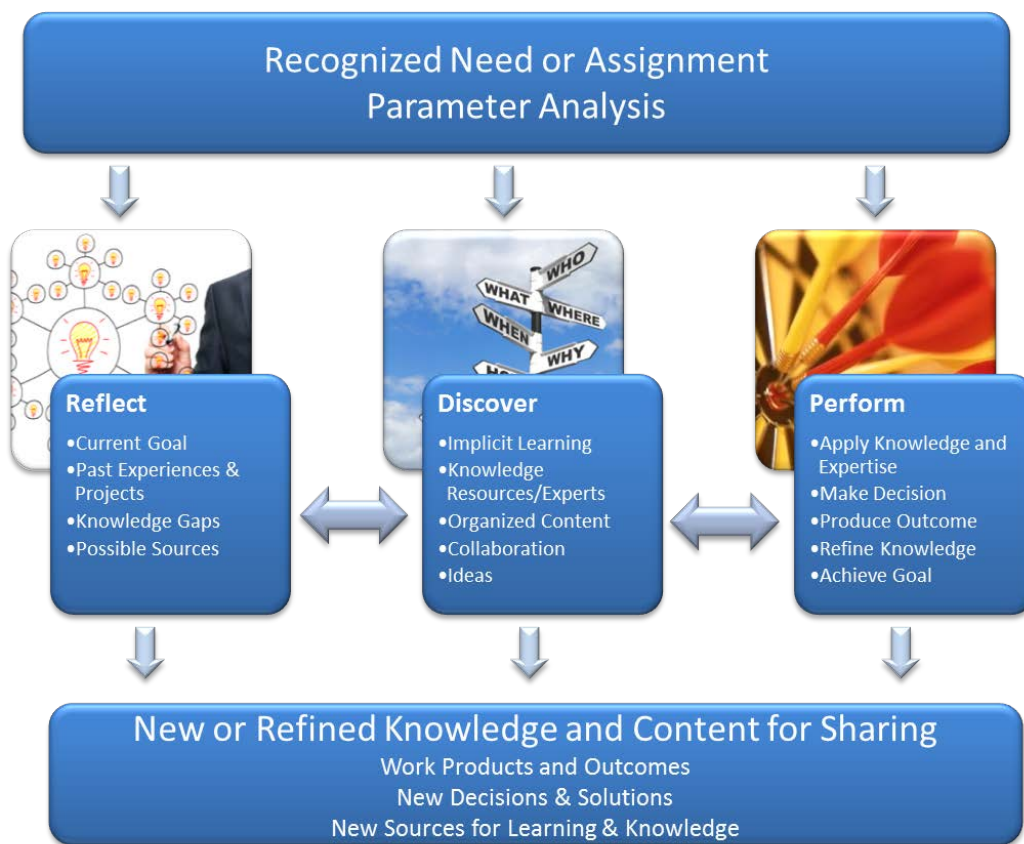
<sup>4</sup> Dale, M. and Bell, J. (1999) *Informal Learning in the Workplace. DfEE Research Report 134*, London: Department for Education and Employment.

<sup>5</sup> Eraut, M. (2000) 'Non-formal learning, implicit learning and tacit knowledge in professional work' in F. Coffield *The Necessity of Informal Learning*, Bristol: The Policy Press.

## Augmenting the Informal Learning Process

Consider how informal learning could occur in a more collaborative environment, enabled by a tool such as SharePoint. Collaborative portals or content management systems make organizational knowledge and collective experiences available for review, reflection, and reuse by others. Designed properly, collaborative portals can enhance the quality of task or project outcomes by augmenting the informal learning process, extending it beyond the individual. This makes it easier for the performer to draw on the expertise and experiences of individuals outside of his/her immediate sphere of influence.

Figure 1 illustrates the *Reflect-Discover-Perform* model of how informal learning occurs and drives performance when individuals effectively use collaborative portal and content management systems.<sup>6</sup>



**Figure 1.** The *Reflect-Discover-Perform* Model of Informal Learning in a Collaborative Environment (McGraw, 2012).

As illustrated in Figure 1, the starting point is the recognition of the need for specific learning, a new task or project assignment, a new problem to be solved, or a decision to be made. Before real work begins, the performer mentally conducts a parameter analysis to understand the bounds within which he or she

<sup>6</sup> McGraw, K. (2012) The Reflect-Discover-Perform Process of Informal Learning in a Collaborative Environment. Cognitive Technologies, Inc.

must work. This process helps the performer understand the possibilities, while bounding the scope of the assignment.

Next, the performer REFLECTS on the current goal, tapping long-term memory to examine past experiences, problems, projects, and decisions that are similar in some way to the new assignment. This enables the performer to determine the applicability of his/her past experiences. It also provides the performer with the opportunity to recognize personal knowledge gaps that need to be filled to accomplish the new task. So begins the informal learning process, which includes identifying possible sources. In a tool such as SharePoint, this process is supported by well-designed search features that allow performers to do key word searches for possible sources and content that could be explored.

In the DISCOVER phase, the performer explores the sources and knowledge found. At this point, implicit, directive learning takes place. Through the use of a collaborative portal, the performer can contact experts, mentors, or role models based on their specialties. He/she can review technical papers, strategy documents, and other organized content posted on the site. Because SharePoint supports effective document management and versioning control, the performer can collaborate with individuals who are not co-located with him/her, to develop new ideas and work toward completion of the assignment.

In the PERFORM phase, the performer applies not only his/her previous knowledge, but also the new knowledge and learning attained in order to complete the assignment, make the decision, achieve the goals and/or produce the required outcomes in their job.

As this model is applied, new knowledge and content is being created and new decisions are being documented. Not only has the individual performer tapped the organization's knowledge to succeed, but in the process, he or she also has become a new source for knowledge and content. The process is not complete until new learning can be captured and organized to further extend the organization's document library and knowledge base.

## Techniques to Facilitate Collaboration and Informal Learning through Portals

We've been called in to help organizations implement, configure, or re-design SharePoint collaborative portals for projects, teams, and business units. SharePoint is a powerful tool that supports informal learning in the workplace. But like all tools, its end value depends on how well it has been implemented, configured, designed, and managed to support the needs of the user community. Think about it this way: Let's say that today you found a shiny red Ferrari in your driveway—your very own race car! Imagine your excitement! As you briefly check it out, you're amazed by the powerful engine. You jump in to take it for a spin, and you quickly realize that you don't know how to harness the power effectively. You've got an amazing car, but if you don't have the proper preparation and training, its capabilities are wasted on you.

Similarly, SharePoint's capabilities make it a great tool to support informal learning in your workplace. But to enable effective informal learning and achieve the adoption and usage rates desired, your project team must prepare properly for the project. This means carefully determining and documenting the goals and outcomes you want the project to achieve, and learning about SharePoint's features and functions. It requires defining the success criteria and metrics that will help you monitor your progress. Finally, it means paying attention to the user community from the start, including how they will use the system to search for and add content, collaborate with others, and learn. Here are three techniques to help you build a foundation for collaboration and content management project success.

### 1. Capture User Requirements to Avoid Mental Model Mismatch

The first place to start is with the user community. Good instructional designers and performance consultants know this, and that is why they should be included on the collaborative portal team. Unfortunately, the following scenario is not uncommon: the SharePoint project is announced, and IT immediately develops a prototype portal based on SharePoint's "out-of-the-box" functionality and features. This rarely matches the user community's requirements or generates much excitement for the collaborative portal. Figure 2 illustrates why a portal developed without the right kind of input from the user community usually falls flat. Similar to the proverbial comparison of apples and oranges, we call it "mental model mismatch."

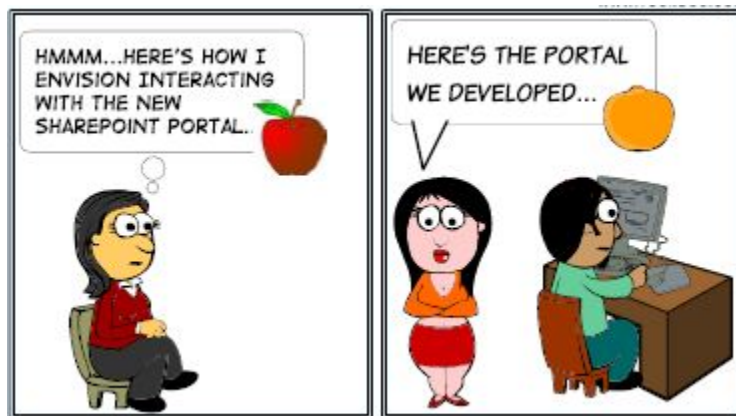


Figure 2. Mental Model Mismatch (McGraw, 2012)

Here's what it means to you: As the project begins, the user community immediately begins envisioning how they might work with SharePoint to manage their content, share information and announcements, collaborate with team members, and search for nuggets of knowledge stored in the system. They develop a mental model for how they will interact with the system. This model is based on the work

they do, the outcomes they produce, the information they use, and the knowledge to which they wish they had better access. On the other hand, you have IT. They have in mind how SharePoint will operate from a technical perspective, based on its standard features and functions. The portal they develop probably won't meet the needs of the user community for the

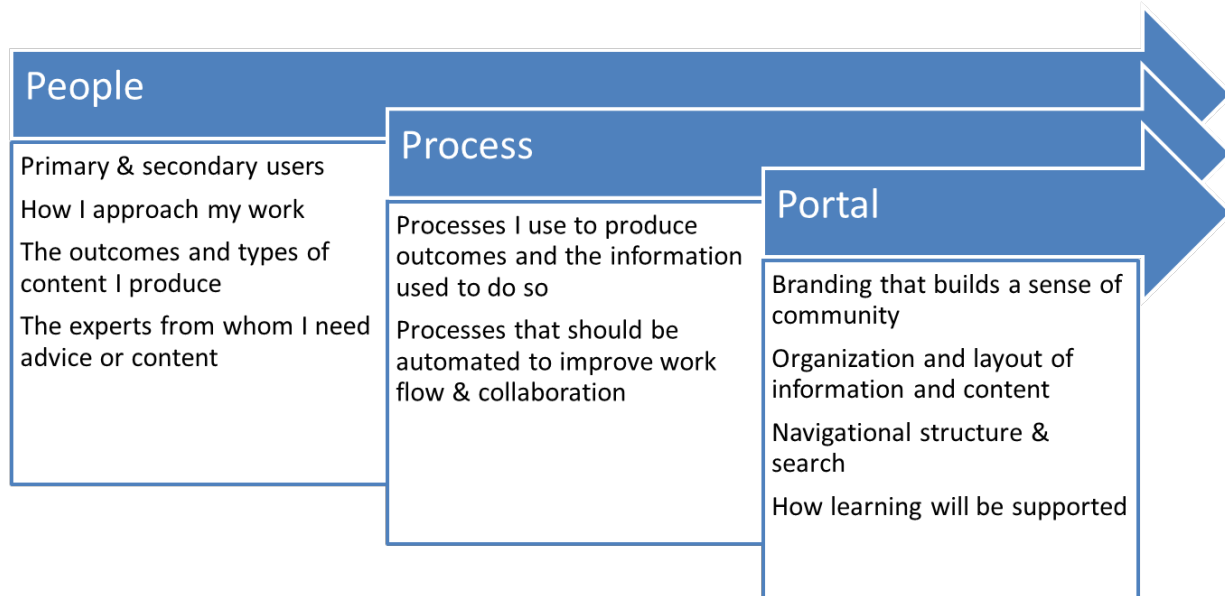
- management of content and knowledge
- sharing of information
- ability to build a collaborative work place
- ability to support informal learning.

Consequently, a mental model mismatch occurs, inhibiting excitement, creating disenchantment, and eventually, negatively impacting system usage.

To improve project success, conduct an analysis of the user community—how they approach work, how they perform work, and how they learn. We use [the Performance DNA™](#) methodology to interview primary user community members and stakeholders. This helps us ensure that we understand the outcomes they produce, the key work processes they perform to produce outcomes, and the information and knowledge they need for optimal work products. We analyze the requirements gathered to consolidate them across performers and document the user requirements and functional priorities. After interviewing several performers and documenting requirements, we may discover that 80% of the needs can be met by standard SharePoint web parts, but that a few custom web parts and automated work flows are required to meet that other 20% of the needs. This enables the client to make decisions about the project and to phase project activities appropriately, while better meeting the needs of the user community.

## **2. Use the *People-Process-Portal Model***

After the user requirements are known and integrated with the technical requirements, we begin portal design. As the design phase begins, we use the People-Process-Portal model to keep us people-focused and to determine the best ways to realize requirements through site branding, layout and design, content organization, navigation.



**Figure 3.** The People-Process-Portal Design Model (McGraw, 2012)

We use an agile approach to portal design, creating quick, iterative prototypes we can show to get feedback and deepen our understanding of client needs. To achieve effective branding and design, organization and layout, structure and search, and learning support, consider the following:

- **People:** Who is going to access the portal? Who and what kind of expertise is being sought? What outcomes will the expected user community produce? What types of content is usually created in the course of doing their jobs? What types of experts will they need to connect with? Will they have previous experience with content management or SharePoint? What kind of training and/or job aids will be required?
- **Processes:** What processes and workflows drive daily work? Which processes slow us down? What processes actually don't help us at all? Which workflows can and should be automated? What processes should be changed or eliminated?
- **Portal:** What type of branding and design will build a sense of community? Do the organizational processes suggest any specific content organization? How should the information and content be organized to enable good access? What dynamic information will be displayed (e.g., announcements, calendars, newsfeeds, stock prices)? What key words will best fit the users' mental model for searching for specific content and artifacts and filling knowledge gaps?

### 3. Make it Personal to Pass the WIIFM Test

The third technique we suggest is to make the collaborative portal *personal* to answer the “What’s in it for me?” question. An organization’s ability to enhance the learning of its members depends on the willingness of the members to connect, respond to requests, and consistently share new documents and other forms of knowledge. The collaborative portal project team, together with the organization’s leadership, can do several things to encourage appropriate participation, use, and sharing: motivate users to connect, motivate users to respond and share, and build a culture of collaboration.

**A. Motivation to Connect**—According to Woody Allen, “Ninety percent of life is just showing up.” While we think there is more to it than that, it certainly is a start. You can’t share expertise and knowledge until you “show up” on the collaborative portal. One way to encourage the user community to do so is motivate them to create personal sites, such as the My Site feature in SharePoint. Your My Site serves as a point of contact for other users in your organization to find information about you, your skills and interests, and even what you are working on. Each person’s My Site provides:

- A central location for them to view and manage all of their documents, tasks, content, links, calendar, colleagues, tasks, and other personal information
- A way for other users to learn about them and their areas of expertise, current projects, and colleague relationships.

My Site pages enable each person to present content and documents to other people, create their own workspaces, provide information about themselves to other people, and learn about the status of their colleagues (Figure 4). This makes your collaborative portal or content management system much more personal and motivates people to participate.

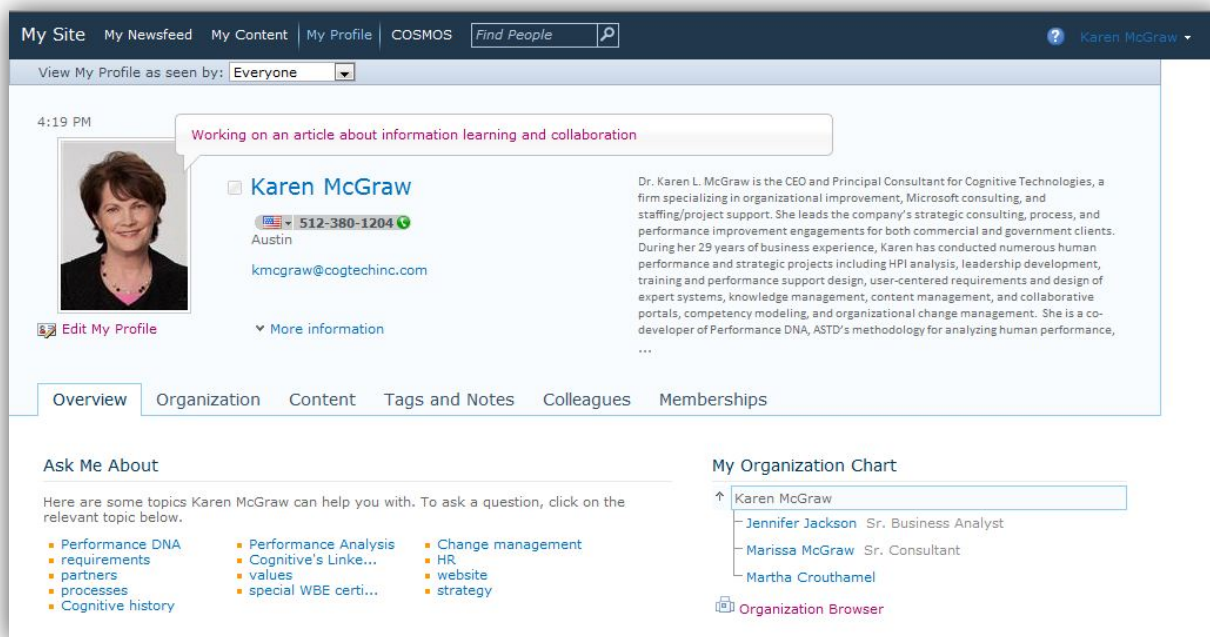


Figure 4. Example of a My Site Page

## **B. Motivation to Respond and Share**

Informal learning through collaborative portals won't happen on its own. The key to portal usage and adoption is quality content and knowledgeable experts. Without this, the portal will quickly get a bad reputation for having nothing of value.

So how do you get the right types of content and the access to the right experts? One key to success is to motivate experts and recognized leaders to participate. Ensure that experts in critical content areas create My Sites, listing areas of specialization, and uploading content to the portal. Make a global request to experts in specific areas, asking them to set up their site and participate. Ask managers to cover the request in their next team meeting to improve the likelihood of compliance. Informal motivators also work, such as contests. One of our clients held a drawing for prizes from names that were entered after people completed their My Site pages or submitted content to be included.

In addition to posting information for sharing, experts must be motivated to respond to requests for information from the organizational community. For example, one global high-tech client has included responding to information requests on job descriptions for their technical staff positions. Experts in other organizations may not need additional motivation, finding personal satisfaction in sharing their tips and techniques with individuals and project teams. Every culture is different—find out what works in yours to motivate response and encourage sharing.

## **C. Build a Culture of Collaboration**

“Build it and they will come” is a great movie quote, but won't win any change management awards. Pay attention to your culture when encouraging and leading collaboration. Command-and-control cultures, especially, will require more overt leadership over a longer term in order to achieve true content management and collaboration. Some leaders think that a broadcast email is sufficient to get people to embrace collaboration and content management. But in fact, it requires much more than that. Popular techniques to improve an organization's level of collaboration include:

- Assess organizational change readiness and plan ways to remove barriers to collaboration in your culture
- Hold town hall sessions to communicate why the portal is being developed, why it is important to your strategy and competitiveness, and how people are expected to use it
- Conduct webinars demonstrating how to complete a My Site
- Encourage leaders to 'walk the talk' and participate collaboratively in SharePoint to model the behaviors they want others to do
- Deliver virtual or classroom training on SharePoint functionality, including how to upload documents, how to tag documents with searchable key words, how to search for content, and how to connect with an expert through his/her My Site page
- Assign a job role in each business unit to keep the portal well organized, to retire old content, and monitor usage and adoption
- Include collaboration and thought leadership in job descriptions, hiring profiles, performance management tools, and competency models

- Use metrics to monitor adoption levels, usage, and satisfaction with information found, to identify opportunities to increase participation and continually improve.

## Closing

Informal learning is here to stay, and has taken on increasing importance as budgets for formal training have been cut. All job roles can benefit from organizational support for informal learning. Such support makes it easier to search and find key content, collaborate with peers, experts, and role models, and fill knowledge gaps. Collaborative portals and content management systems have become a critical tool to support the learning process, while also enabling easier collaboration and communication. The Reflect-Discover-Perform model we presented describes how the informal learning process can be supported by these systems.

But don't let your collaboration and content management system resemble the fancy race car that no one is prepared to drive. In this article we have described three techniques to facilitate collaboration and informal learning through collaborative portals. These techniques will help ensure that you get the organizational value and ROI you need from these informal learning tools.

- First, capture user requirements to avoid a mental model mismatch, and to make it more likely that the user community will use and adopt the system.
- Second, apply the People-Process-Portal design model to ensure that the portal design reflects the organization and supports the people who will use it to collaborate, search, reuse, share, and learn.
- Third, make it personal to pass the "what's in it for me?" test. Encourage users and leaders to actively participate, connect with others, share expertise, and respond.

Don't let informal learning be an afterthought in your organization. Plan for it, support it with well-designed tools, motivate participation, and involve learning and performance specialists in its design and management.

## About the Authors

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