



Transcript for the WLEI Podcast:

## Exploring the Advantages of Online Learning

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Featuring: Host Tom Ehrenfeld and his guests, the Lean Enterprise Institute's Josh Howell, Matt Savas, and Masia Goodman

**Tom Ehrenfeld:** As we work to figure out how to work in this pandemic-tinted world, lean practice suggests a few practical approaches ahead. Peer-to-peer learning, shared experimentation, iterative discovery are all appealing opportunities for earnest improvers to tackle shared challenges virtually. Welcome to a special edition of WLEI, the podcast of the Lean Enterprise Institute. Listen as LEI's Josh Howell, Matt Savas, and Masia Goodman talk about the upcoming Virtual Lean Learning Experience and, specifically, the ways in which its design taps into lean ways of working and learning.

**Josh Howell:** Hi everybody, this is Josh Howell. You may know me as the president of the Lean Enterprise Institute, and I'm joined today by Matt Savas, one of the team leaders at LEI; Masia Goodman, who leads the instructional design, does much of the heavy lifting for the educational experiences LEI provides.

And we're here today to share with you about the experience we've had responding to the situation surrounding Covid-19 as it relates to the Lean Summit that we planned to put on in Carlsbad, California, and the transformation of that experience into what we're now calling the Virtual Lean Experience.

**Matt Savas:** We had a 700-person conference quickly turning into sort of a backyard cookout with a handful of friends. There was really no choice, for all kinds of reasons, but to pivot. We had to make a change. Had to do something. Yeah, we're choosing not to do nothing, so we're going to do something, and that something is meant to provide as much, and we think perhaps more value than what we had planned for Carlsbad.

**Josh Howell:** That's right. Figuring out what a summit, a conference can look like in a virtual setting-- given the situation, people unable to travel, people not wanting to gather in large groups, so folks are going to be home. What can a Lean Summit, what can any summit, what can any conference look like virtually, and deliver, as you said, a similar experience, and possibly even a better experience? Figuring that out has been really exciting, really invigorating, actually.

**Matt Savas:** It certainly caused us to interrogate the value of a summit, right? So, why do people fly out to California to gather for a couple of days? And so, that's been actually a wonderful challenge to really dig into that. What do people value in this experience?

It's just been really enlightening to interrogate that both conceptually, but also in engaging with customers, and that, I think, in the long run will be a great thing for us here at LEI.

**Josh Howell:** I think that's right. So, we got to the place where we kind of through breaking down the summit experience into different sort of tenets of what people appreciate and look forward to, again, as we've been talking to folks, exploring options with them of what they'd like to do now, we keep hearing these kind of four tenets over and over again. And they really sort of boil down to one, the opportunity to get away. To get out of the grind of their daily work and to go somewhere else, in this case, somewhere sunny, like Southern California, Carlsbad, California.

**Matt Savas:** No doubt, that's a big thing. I was actually looking forward to that as well.

**Josh Howell:** Yeah, no doubt. Me too.

**Matt Savas:** I planned a road trip up to Sonoma right after the summit. I was going to leave Wednesday morning from sunny San Diego and enjoy a few days out there with my wife.

**Josh Howell:** I was looking forward to that too. So that was one thing, and there is no substitute for that online, just no substitute whatsoever. So, identifying that and then recognizing that there's no way to replace that or replicate that online was an initial insight.

The second thing that people look forward to is, let's say, getting inspired--being encouraged by others' stories of lean transformation. So, storytelling. And the stories that we hear is second of the four tenets that we've identified.

What is it about that, Matt, that you were looking forward to? We have some pretty remarkable speakers lined up this year, we've had great speakers in the past telling their stories.

**Matt Savas:** Well, no doubt. One of the main purposes of a summit is to provide people the inspiration and the courage to go do something. And nothing provides more of that than a great story. When you

hear somebody with a thrilling example of transformation, you get fired up, you get excited, and you think to yourself, "I want to go back and do that."

**Josh Howell:** That's kind of a hallmark of the Lean Summit, that the stories that are being told are being told by the people who are doing these things.

**Matt Savas:** This is an area of opportunity I think for us.

**Josh Howell:** We're excited about the possibilities, actually, for storytelling through this new format.

So, the third thing that we recognize people appreciate about conferences, in addition to getting away and hearing stories of lean transformation, is the opportunity for networking. For interacting with the speakers that they hear from and the other members in the Lean Community who are like them, colleagues in a way--colleagues in mission.

And so, hard to beat an in-person conference for interacting with people that you relate to and networking, but not impossible, in fact. We interact with people virtually all the time.

The fourth thing that I'll add, and then we can start to explore this a bit further and explore the ways that a virtual conference can allow this value to be delivered, is the learning that they take away. So, just being inspired, just being encouraged is not enough, as you said earlier, Matt. We go to conferences to have exposure to ideas, to stories, so that we can return to our place of work, return to our purpose, and do something different. Improve, make things better. So, the learning is also a part of a summit experience, a Lean Summit.

And so, with those four things in mind, recognizing that one, getting away is now impossible, but that storytelling and networking interaction and learning are possible through a virtual medium. We started thinking about how to deliver those things, leveraging the capabilities that a virtual platform has, all the technology available to us.

Thankfully, in thinking through that, Matt and I weren't just left to our own devices. We had a team member, Masia Goodman. Masia, as we think about those three things--storytelling, networking, learning--what is it that you're excited about? What is it that you recognize in a virtual summit, a virtual experience, that we can deliver.

**Masia Goodman:** Sure. Yeah. Thanks for inviting me. Thanks for asking the question. So, first of all, actually, something that folks who are involved in online learning think about a lot is how to overcome the gap of lack of face-to-face interaction. How can we overcome that? Because that's an important part of learning too, so I'll actually wrap in that first part that people value in our summit. I'll get to that in a minute.

But the other three parts, so the storytelling, networking, those are not at all distinct from learning. In fact, we learn through stories all the time, that's a kind of common tenet of learning design, that we learn well through stories. In fact, there's some TED Talks about there about people who memorize vast amounts of data and how they do it and remember long speeches and these types of things. They hook it into stories.

So, the story might not even reach the audience, but that's how they're structuring and remembering large sets of information. So, we learn; stories help us retrieve information, they help us remember information, and that's all really important. So that's intersected with learning already.

And networking does a similar thing; it has an even larger role in online learning because it helps you interact. It helps you to stay engaged by interacting, so therefore you're kind of playing with the learning material. It's almost like giving a child some Play-Doh, and you can have them just look at it and see that it's this mass, or you can allow them to pick it up in their hands and squish it and play with it, and they're learning more about the substance now as a result, because they're interacting with it.

So, by networking with other people, it's a similar thing. You're getting to talk about these ideas, think about them from a perspective you haven't thought about them previously, and it's just getting you engaged with that topic that much more. And that's going to help your learning even further. Now, some people really resist that idea, actually. They resist networking with peers and peer-to-peer learning, because they think, "Well, isn't this like the blind leading the blind?"

In the case of small children, that might be true. But with adults, we all have different experiences. So when a speaker talks about something like trying to motivate her staff to overcome a previous way of thinking and conducting themselves and their job, we can all relate to that, whether or not we've had that exact experience. And so, the more stories we then hear that are similar to that, the better we're going to understand that topic, and it'll just get wired into our brains a little bit more permanently.

### **Designing Learning Experiences**

**Masia Goodman:** Okay, so that's how all of these tenets kind of relate to learning. But if you don't mind, I'll just talk a little bit about how the design that we've got going for the delivery of the material and how that actually relates to learning too.

**Josh Howell:** Sure. Sure, please.

**Matt Savas:** Yeah, that'd be great, Masia. What have we cooked up?

**Masia Goodman:** So what we have cooked up is, if we take each individual component of the summit, so one company or one person's story that they bring, we're going to share that story early in the week and then provide some ways to interact with that story. We're going to put the Play-Doh on the table and let people pick it up.

And so, that might be in the form of a challenge, "Hey, go try this thing at work, see what happens, report back." It might be in the form of a question: "Hey, what do you guys think about this particular piece of the topic?" And it might just be, "Hey, share your own experiences with this." Or it might even be asking for advice, "Hey, we're hoping to do this next thing. Help us out here." So that's all part of the networking and interacting with the topic.

But also, it's actually an advantage, I would argue, that this is shifting online from a learning perspective because instead of trying to take in all of this information in two days, which is like trying to consume your week's worth of calories or even a year's worth of calories in one day or two days, that's nearly impossible. Our stomachs have limited capacity. So does our short-term memory.

So, by spreading out all this interaction and all these stories over several weeks, that makes it easier for it to be absorbed by our brain, and ideally reflected in our behavior. So that spacing technique is really helpful, by having things spread out over the period of weeks. It reduces cognitive load and increases our memory.

So, the other piece is all the peer-to-peer interaction that we've spoken about with regard to networking and how that really helps with our learning.

### **Building a Personal Learning Network**

**Masia Goodman:** The other piece, this was a big part of a program that I just completed, and a big point of the program was that just because you have a certificate on a wall or whatever, a degree or a diploma or anything, that that doesn't necessarily indicate you're done learning. In fact, if the teachers or professors were worth their salt, they've hopefully convinced you that you're only at the beginning.

I was equally convinced of that and helped develop what's called a personal learning network, a PLN, and that's a great opportunity here. We all say at the end of every summit, "Oh, I want to keep in touch with these people," and rarely, if ever, do we. Maybe we share a LinkedIn contact, right? But it's hard to

transition from an in-person relationship where you see someone once--maybe once a year, or maybe once ever--and then develop a functional online relationship with that person. That's pretty rare.

But here, we have a chance to interact with each other regularly over the course of several weeks, so we're already building this relationship online, so it's easy for it to then continue. We can develop our own personal learning networks as a result and continue to network with these people long after LEI's portion of the program has concluded.

**Matt Savas:** Yeah. I'll share perhaps an example of that. So, I have a part-time job as Director of the Lean Global Network. I do it weekends, nights, and there are 30 or so institutes that are scattered across the globe, everywhere from Netherlands to China to Botswana to Australia. And so, there is rarely an opportunity. Actually, I would say there is probably no single member of the network that has met every other institute, a member of every institute.

One thing that we've done over the last couple of years is try to do what you just described, Masia, create a forum where they're able to connect continuously through simple devices. The one that we use is the WhatsApp chat, and it is really incredible. This has been active for three years. It started in 2017. And every day, there must be a dozen messages posted to that channel from all over the world, and there are people who have never met one another who are deeply engaged with one another.

And I've just found it to be a huge benefit for the network because people, I think as a consequence of it, feel closer to each other than they ever have. And so, yeah, it's been a powerful thing.

**Josh Howell:** Well, as a member of that WhatsApp group myself, joined three years ago, I can testify to what you're saying, Matt. It's been a remarkable experience. We've had some intensive shared experiences with many members in that group. But then, like a day like today, there was nothing formal scheduled for us to do, and yet, I heard from several members in that group. What they were up to, what they were learning, what problems they were trying to solve. I think each of those things, actually, was a part of today's chatter. It's been a great experience and something that we look forward to creating and recruiting people through the Virtual Lean Summit.

Masia, on the topic of peer-to-peer, and I guess playing with the Play-Doh--kind of interacting with the information, reflecting on it, discussing it with other people, maybe trying to answer questions or even applying it--it occurs to me that in a molecular summit like we were going to put on in Carlsbad, the number of those interactions is really limited. I mean, as an attendee, there are only so many people that I'm going to interact with, there's only so many conversations that I'm going to participate in, myself personally.

But in fact, of the 700 people or so who would have been there, lots of conversations are taking place, I just don't have any visibility to them. I don't know what other people are talking about, necessarily, unless I'm really active and roaming around and eavesdropping and trying to join every possible conversation. But in this format, with the scalable technology of a platform like WhatsApp for the LGN group or Slack, which is one of the platforms we're considering to use, that sort of limitation, that constraint is kind of stripped away, it seems to me.

## **Making Connections—in Learning and with People**

**Josh Howell:** And I guess just the technology itself as it relates to what you're describing and the learning outcome, how is it that you think about that with your understanding?

**Masia Goodman:** Yeah, that's a great point. In some ways, I was thinking about it less in terms of the learning outcomes and more in terms of what's less socially awkward. At the summit, you might realize you're in this conversation that, "Maybe this isn't really the topic I'm most interested in, and I can overhear this thing over there. Let's see, maybe if I go get a drink at the bar then I have an excuse to go join that group over there," and you have to figure out ways to, in a socially acceptable way, navigate the scene and tune out from one channel and tune into another.

So that's something really easy online, there's no harm, no foul if you tune into one conversation or tune into another one at the same time, it makes it much easier to connect with the people who you actually want to connect with because you come from perhaps a similar industry or you're sharing similar problems, or you just have similar interests in where you want to go with lean. So that's really nice, it helps you narrow down your group that you can help, and who can help you.

**Josh Howell:** In this case, where all the people participating will have their own experiences, their own perspectives, their own questions, and by having visibility to more of those, the benefit that I can get as a participant seems to be exponentially greater. So for learning outcome, I guess that was kind of what I had in mind, I guess is just exposure to more of what's happening and the opportunity to participate in conversations that otherwise would have been unavailable to me without, as you said, sneaking away from my own conversation to go get a drink or whatever and joining another one.

**Masia Goodman:** When you're taking in all the stories at once, it's hard to kind of knit them together and make sense of things. I think folks who are familiar with lean, actually, even if it's not lean; if you think of anything that you have a lot of knowledge about, you have a network of that knowledge.

So somebody who's really familiar with basketball, if I throw a bunch of professional player names out at you, you're going to have them categorized in terms of what teams they used to play for, what years they started, or what schools they played for before joining the NBA and that type of thing. Whereas if you ask me a bunch of NBA players' names, you might be lucky if I recognize they knew something about basketball. So, you have this neural network built in that I don't have, and folks who are familiar with lean have this network, they see how each facet relates to another one.

So, I'm almost picturing a child's toy, where it's got different nubs and lines, and it shrinks together, or it can expand out into this larger orb shape, if you've seen that type of toy. You can't see my hand gestures, folks listening here, but trust me, such a toy exists. I think that's what's exciting about presenting these stories one week after another. You start to see how these things thread together and how they all relate to this larger network of lean concepts and the interconnectedness, the interrelatedness of all of it.

If we just tell you that these things are interrelated, that's quite boring. But to start to piece them together on your own over the weeks, that also improves your learning, your retention, your ability to actually do something with this information. So, I think that's really exciting too.

### **The Best Learning Experience Yet**

**Matt Savas:** As you've laid out, Masia, from a learning perspective, from a networking perspective, from a storytelling inspiration perspective, and then how those all tie together, it seems like we have a real opportunity here to provide maybe the best learning experience LEI has ever managed to dream up, and so that's pretty exciting.

**Masia Goodman:** So, one other piece that's really exciting about the summit is, in the two-day version, you don't have a chance to try anything from it right away, which means you just forget about it. And I don't think anybody would argue that on-the-job training is some of the best learning you can possibly get. It's learning by doing, and it's just-in-time learning.

So, you have the potential anyway, with this design, to learn something and then try something out. So, not just talk about it and learn from other people, that's really valuable also, but to actually go give it a shot at work. And so, bridging a little bit the difference between passively listening and OJT [on-the-job training], that there's something a little bit in between.

**Josh Howell:** Like-a go-do challenge, or some kind of homework, offered associated with that, that we can then check in on through the interactions on the social platform, and even check in on during the webinar at the end of the week. The speaker themselves could hear from people what they've tried.

**Matt Savas:** You know what I bet will happen? The people who do something will share it; they'll post it. And then you're going to feel a little bit of both inspiration and maybe even a little pressure or competition to go, "I wonder if I can do that a little bit better." And I could see this kind of snowballing, where the amount of activity that takes place each week builds. Because the kind of challenge people are delivering to one another, the inspiration that people deliver to one another, will grow over time.

**Josh Howell:** And what we can provide is the platform, the structure for that to happen. We can be the leaders, the facilitators of it. It's going to be exciting.

**Masia Goodman:** So even though we don't have the face-to-face component, I actually think we're going to be building more of a community through this experience.

**Matt Savas:** No, totally.

**Josh Howell:** I think so too.

**Matt Savas:** Yeah. Absolutely. The size of it, the level of engagement you can have with it, and then also the duration of it. So, two days, once they're over we all go home, fly off to wherever, and probably never interact with--maybe, like you said, Masia, you hang on to one or two that you connected with, but otherwise, it all just kind of disappears, evaporates. In this case, it doesn't. It lives on. Yeah, that can be a much more powerful thing than a few minutes of face-to-face interaction, for sure. That's pretty exciting.

**Josh Howell:**

I think another thing that's really exciting about it is that it brings together two main things that LEI does, sort of our two main purposes. So, LEI describes itself as a research and education institute. Research tends to take the form of participating in and then telling the stories of lean transformation out there in new areas, in new ways, fulfilling our mission to advance lean thinking throughout the world, through discovery, through research.

We tell stories, share with the community through means like The Lean Post, through the books that we publish, through conferences and stories told, but often, that's kind of one set of activities.

Sort of separate from that is the educational stuff that we do. We put on workshops, various learning experiences, learning tours, provide on-site training and coaching; that's sort of another thing.

That these things are sort of being brought together in a new way, in a really interesting way, where stories are still being told, but then immediately connected into educational experiences. The interactions happening, the peer-to-peer learning with techniques, like spacing, that you're describing, Masia, and then the webinar at the end of the week that kind of rounds it out, another chance to interact with the speaker, further processing their story and their insights, getting closer then to becoming applicable for you in your situation, in your work at your organization.

I think that's really exciting, and as this idea of a Virtual Lean Summit has been emerging, as the thinking, the design of it has been unfolding, I think increasingly, it's become clear to me and really exciting for me, I think for all of us, how that kind of thought leadership, that research and education are going to be really coexisting through the Virtual Lean Summit in a new and kind of exciting way.