



WillowDNA and Initiative

Capturing domain-specific knowledge to create learning programmes

Some subjects are complex, very specialised or specific to an organisation or profession. This can be referred to as domain knowledge and it is essentially what makes that organisation what it is. This means off-the-shelf generic learning content simply isn't up to the job, credible or relevant.

It demands an approach that supports time to mastery, supporting the learners throughout their journey from knowledge acquisition through practical experience and confident application of skills. The best programmes include plenty of opportunities to connect with subject matter experts, assignments and challenges that encourage learners to try things out in the workplace and social learning tools to encourage learners to share reflections and use their experience to help bring context and practical insight. It's these things that deliver business impact because an approach that focuses on real world application delivers measurable results.

Initiative and Universal McCann

A great example of this is WillowDNA's work with Initiative and Universal McCann, divisions of global media company, IPG Mediabrands. As leaders in advertising and

media, they build their reputation and success on their reputation for having the best insight, data and analysis of media channels and consumption. Their rigorous approach to analysis and delivering campaigns which deliver tangible impact and results for clients have made them a global leader. To achieve this demands significant investment in statistical data analysis and market intelligence tools and the culmination of this work is IPG Mediabrands world leading Matrix and CAT tools. Developed by the leading experts in statistical media data analysis, the tool is complex, detailed and highly valued. All this means that this subject is tough; this is challenging stuff and on the face of it, difficult for many to understand and as such, readily apply.

So how do you take what on the face of it seems like a tool that to all but the experts is intimidating, complex and dry and make it so popular that it sits at the heart of how people get work done?

Taking on the challenge

This course and supporting community site was delivered in 2011 and has over 1000 learners and community members. The project consists of a whole approach to increasing capability within Initiative in understanding and applying a very sophisticated media-planning tool, Matrix.

Matrix is a key definer in achieving new business for this company as it is unique and embodies core capability within the organisation in realising benefit for their clients. Matrix is sophisticated and requires considerable insight. The challenge was to create confidence in this critical business tool both for new joiners and also for existing analysts to achieve high performance for their clients, quickly!

Working together, Initiative and WillowDNA created an integrated approach to this key business need. The tools employed included social media tool, Yammer and WillowDNA's Pathway platform to serve up the learning objects. Initiative and WillowDNA worked as a joint team to create the overall effect, acknowledging that uptake depended upon a number of factors, including access to the experts via a user community site as well as access to highly-crafted learning.

The course itself is reached via the tool itself as online help. It is a performance learning tool, working as a just in time approach as well as a method of inducting new people.

This approach has proved immensely popular by this demanding group. Feedback has been excellent and the overall confidence level within the company is much higher. A growing number of internal case studies illustrate the value of this confidence in terms of business value.

Background

Initiative, owned by the Interpublic Group, is a global network within the company's IPG Mediabrands unit. It employs more than 2500 media communications professionals, working in 90 offices across 75 markets worldwide and provides a comprehensive range of media communications services including: insight and strategy, communications planning, media planning and buying, digital communications solutions, content creation, social media and community management.

This impressive range of services is delivered to Initiative's clients through the expertise of the people who work at this agency. The Initiative planners are supported via a tool, Matrix. The Matrix tool embodies the IP of the company and enables years of experience and extensive e-data to be mined. The tool then enables the Initiative teams to produce comprehensive strategies to manage clients' campaigns, underpinned by rigorous analytics.

It is hugely desirable for Initiative to ensure that depth of knowledge embodied within the tool is fully understood and exploited on behalf of its clients. That was the challenge and this project is the outcome of that challenge.

We should add here that while other companies also have planning tools, the Matrix tool is seen as far more fully comprehensive than others in use elsewhere. Matrix the tool - is very complicated - equally to more than 10 tools elsewhere. The effective frequency wizard is usually one stand-alone tool. Matrix has taken over 10 years of development and is focused on excellence in execution of campaigns. But

of course, that excellence is only realized if people understand how to make the most of the tool in their day to day work and projects.

Outline Solution

Joanna Foyle of Initiative, inspired by her experience on the IPA Foundation in Advertising programme, felt that a similar approach could be the solution to the problem of realizing the benefits of Matrix.

Working with the WillowDNA team, Joanna and Sue Moseley, Initiative's Global Chief Performance Officer, created the overall learning concept including the overall ecosystem linking learning, performing and delivering through the tool, the community site and, of course, the learning itself.

Joanna's role as community facilitator was key as was the 'ownership' of the learning within the Matrix community. A simple yammer site was set up to support the dialogue around the use of the tool and the spread of capability in the use of the tool. The course itself was linked directly from the community.

The course design uses Willow's Pathway methodology, providing a learning path that focuses on a specific area and practical application of the Matrix tool, enabling learners to focus on the specific need for their campaign at that point in time. The WillowDNA team used a sophisticated approach to walkthroughs to illustrate the use at a very detailed level of this highly technical tool. Learners are further supported in their use of the tool by materials that explore the applied use of software in a business context. These materials include e-learning and expert insights and summary documents that distill key points and can be readily accessed via tablets, print outs or on-screen.

The WillowDNA team:

- Created the overall learning structure and design
- Worked with the subject matter experts to design the learning programme
- Created the content, from readers to quick tips to diagnostics to e-lessons
- Integrated videos

- Created screen walkthroughs to illustrate complex points
- Configured and installed the learning platform ensuring that the platform fed through from the Matrix tool within the Yammer community and also fed back data on usage as needed
- Worked with the Initiative team to support the community concept and the role of the community facilitator
- The key points that made all the difference for this client were:
- Simple hosted platform and Learning Path design to cope with a complex subject that needed ‘chunking’ up to make learning objectives achievable
- A capable partner able to cope with the complexity of the subject matter – it’s tricky stuff!
- An integrated approach that made learning accessible when needed as well as learning on induction feasible
- Construction of a learning scaffold with opportunity to go “off-piste” individually or with others
- Ability to include voices from within the company, to both support and champion the use of this sophisticated tool as well as the voice of experience of planning

Challenges

The Matrix tool is very complex. Achieving best outcome from the tool could only be achieved by embedding the learning within the performance context and that had to be as part of the community of experts and novices.

Understanding the tool was a challenge but the WillowDNA team soon got to grips with that complexity. Sue Rennoldson, senior instructional designer for WillowDNA says, *“I enjoyed the demanding nature of the content. It required focus and significant attention to detail, well beyond most e-learning subjects and I feel proud of the work we achieved.”*

The teams at Initiative are intensely busy and focused on delivering value for their customers... Debbie Lawley, MD of WillowDNA says, *“We had early conversations around what would be needed to promote the use of the tool and the availability of the supporting course. A community of experts and novices seemed an obvious*

choice. Sue and Joanna have worked hard to promote the community by tapping into the champions around the company. This has worked well and is ideal for this sort of embedded learning and skill based tool where performance and learning need to be hand in hand.”

One of the substantial challenges is that the tool keeps developing! How do you support people with learning objects when the tool itself is a moving feast? We have put in place a revision cycle and a method of noting changes.

Results

The learning objective was to enable the learning to match the need. Previously, trainers travelled the world to deliver the learning. This was very costly and only partially successful. People come and go and training wasted.

Also, learners are at different levels, some are experienced, some are new. The planners needed the training to be there when they needed it. Additionally, the training was previously “*very scary*” as Joanna put it! The tool is complex and the training, rather than supporting the planners, was rather off-putting. This was overcome by chunking the learning up, making it relevant to the needs to the learners as they are in their working environment. This approach didn’t take people out of their demanding working environment and removed the barrier to learning. The variety of learning activities made the learning process fun and enjoyable.

In the past, engagement with the tool in the UK was a significant and costly concern. As Joanna Foyle explained “*Previously, the UK was a country that always had the lowest Matrix usages record. Planners in the UK had the highest resistance to training within 90 offices around the world. The research manager was the only Matrix user in the country. This gave the research manager extreme workload on pitch work and client requests. But since we launched the e-learning programme, planners are much more interested and engaged in training. The UK team used the ‘wall of fame’ to track people’s e-learning progress and now it has achieved 100% completion for the entire team.”*

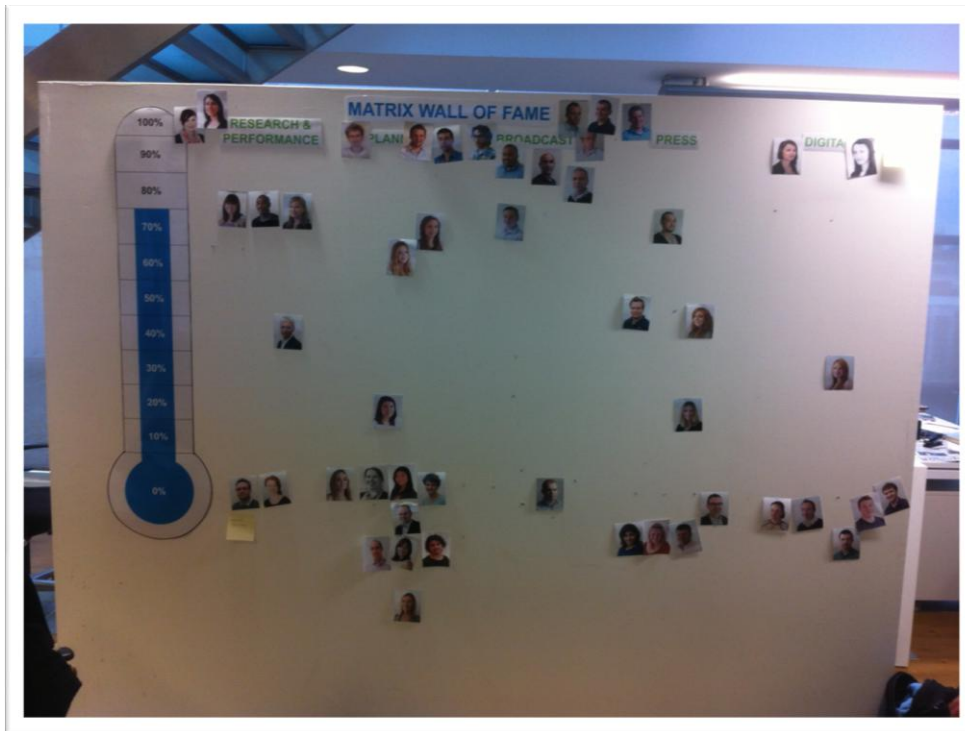


Figure 1 Matrix 'Wall of Fame'

The overall learning strategy has been very effective; Sue Moseley details the key benefits:

1) Improved capability in delivering tasks for pitches.

As a leading global communications network, Initiative pitches and serves many clients that have an international reach. Being able to deliver global tasks and implement strategies throughout 90 local offices is vital for their clients. Matrix as the decision support tool is required in every single aspect of Initiative's media and strategic planning process. With the support of e-learning, they have seen noticeable improvement in the quality and speed of the work the local markets submit during the pitches and everyday work. Initiative has recently won a global media contract for an e-commerce giant with an estimated global ad spending of \$500 million. The e-learning platform was credited for its supporting role in improving the network's capability and helping implement Initiative's culture – Fast, Brave, Decisive and Simple.

2) Enhanced result in communications planning training.

Matrix training is a crucial part of communications planning training. Previously, these two types of training are usually bundled together and carried out through a 3 day workshop at each Initiative office. With the arrival of e-learning, planners can now be not only trained prior to but also supported after the workshop together with the Yammer community. This greatly shortened the length and enhanced the result of the workshop.

Software training is often considered long, boring, difficult to follow and lacking excitement. To create a training programme that is fun and enjoyable has been the challenge for Initiative and Willow from the very beginning. Since the launch of Matrix e-learning, Initiative has received endless positive feedback from their worldwide users. The e-learning programme is now a proven success.

FEEDBACK FROM MARKET LEADS:

<p><i>Netherlands</i></p> <p>Paola Cassone Performance Strategy Director</p>	<p>Awesome! I am addicted to it already! Need to remember I've got a home to go back to tonight.</p>
<p><i>Portugal</i></p> <p>Rita Martins Insight Director</p>	<p>Very clear and user friendly. I think it will be a great help for both initial and more experienced users! Very interesting the videos from Sarah Ivey, Ashley, Sarah Power and others as they put Matrix in context across the Performance Pathway process – really important for users to see the value of Matrix behind the technical perspective!</p>

<p><i>Italy</i></p> <p>Enrico Girotti Insight and Creative Manager</p>	<p>As I got in touch with the eLearning platform, I presumed it could be an effective support in make people using Matrix, but I was wrong... it's super effective!! In the Italian office, this platform gives the chance to increase the number of Matrix regular users and that training, moreover explaining the technical features of the tool, really transmits the distinctiveness and potentials of our proprietary tool.</p>
<p><i>Australia</i></p> <p>Margarita Moya Project Analyst</p>	<p>Wow, great job! I had an excellent e-learning training on the awareness modeling. I've find the "Awareness data" file very useful for those who want to practice on these new features.</p>
<p><i>Thailand</i></p> <p>Nattapon Lertsrimongkol Insight Supervisor</p>	<p>The e-learning is very good! Short, focused and well-structured.</p>
<p><i>Canada</i></p> <p>Chris Herlihey VP MediaBrands Research</p>	<p>These are really great learning tools. Overall, a really super job!</p>

The community has a buzz about it. If people ask for help, they receive it from their colleagues from Initiative's worldwide offices. Even more importantly, they know where to go to receive the help. Typical questions are noted by Joanna and integrated back into the learning content.

There are now over 500 people in the community. That's a lot of brain power! Over 1000 people have experienced the learning. Says Joanna Foyle, "*Previously, people rarely talked about Matrix. Now there is dialogue every day. Understanding how learning works and placing the learning within the community has made such a*

difference. WillowDNA have been part of our team, working with us. Our aims have been the same, to support Initiative to make success of our clients' businesses."

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