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Lessons Learned from an Entrepreneurial Career in Workforce Learning

Ruth Clark

Life Is Tradeoffs

When I returned from a three-week tour of Spain, a good friend asked, "How did you like traveling on a tour rather than on your own?" My response reflected one of my life's lessons learned: "It was a tradeoff. From La Familia Sangrada to the local saffron farm, we were able to experience the unique wonders of Spain in a short time. No waiting in line to get tickets. No getting lost. No unpleasant surprises. On the other hand, if you wanted to sleep in later or spend another day in a place you loved – too bad."In short, like many of life's decisions and paths, there were tradeoffs.

Just as there is no one set of instructional methods that is universally effective for all learners in all contexts, likewise the paths I have taken are not necessarily routes and decisions that will work best for you. I recommend that you review several of the articles in this collection and see what, if any, commonalities you find.

Migratory Childhood

My father was a naval officer, and consequently our family travelled, usually once a year. I attended 12 schools in 12 years, including two in my senior year to graduate from Hollywood High School. I think a childhood of migration prepared me for a later career that involved a lot of solo travel.

I had little career guidance during my school years so by default decided to study nursing after high school. A year in nursing school showed me I did not have the nurturing aptitude that good caregivers need. I transferred to a four-year program majoring in biology and chemistry. My interest in science is one thread that has woven through my career as years later I focused on evidence-based instructional methods.

My Disillusion with Public Education

After a brief stint as a secondary school biology teacher, I worked on an ethnic diversity curriculum development team for a major metropolitan school district. This was my first opportunity to design and develop instructional materials outside of my own classroom. It was also an opportunity to see how one school district was administered at higher levels since I was called on to sit in

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for my manager at superintendent level board meetings. My optimism for public education faded during this period. Beside the rare individual teacher who worked miracles with 30 children and the occasional elementary school principal who manipulated the system to develop a good staff and generate healthy parent involvement, I increasingly experienced the limits of public education. This might be unique to the U.S. education system, which must serve a racially and economically diverse population of learners and parents primarily under a decentralized system of governance. In any event, I increasingly felt that my efforts would not have the impact on public education that I desired. Most professionals want to make a difference in their work.

A New Direction

While I worked in the school district, I started a doctoral program. Even though I had been developing curriculum, in these classes I heard for the first time about the work of Gagne, Piaget, and other early pioneers in the learning sciences. I recognized for the first time some models and principles to inform instructional practice.

LESSON LEARNED:
Evaluate the culture of your setting in terms of your own talents and ambitions and determine whether your energies and aptitudes can make the kind of difference that will satisfy you.

Sometimes a life direction changes based on a minor event. The doctoral program required some electives. I glanced through the university catalog to review the options. The words Instructional Technology jumped out at me. One summer I went to campus to take an introductory instructional design class as one of my electives. My project for this class was a slide-audio tape program on career roles for women. This assignment was my second major instructional development project and I decided to major in instructional technology. I liked the idea of hands-on work on a product that emerged from a systematic process that promoted learning. Subsequently, I took a leave of absence from the school district to complete course work on campus. As one thing led to another, I never returned to public education.

As I worked on my dissertation – a stop-and-go process in my experience at least – I was hired to develop a customer service curriculum at a major utility. This was my first experience outside of the K-12 or university environment. I was amazed to see that within a few months our team developed a training program for new customer service hires that was piloted, revised, and implemented. My initial impression was that in a corporate setting, interventions – even major programs such as setting up an e-learning program – could be accomplished relatively quickly. On the practical side, the salary and benefits in the private sector were much higher than those in public education.

My Disillusion with Corporate Work

There was a price to be paid for these benefits. There were long hours and high expectations. Transitioning from the public education environment that offered 10 weeks off in the summer, two weeks at the Christmas holidays, etc., to 10 days of vacation per year was challenging. I recall being the only staff member in my department Christmas Eve dutifully answering the single phone call from an executive vice president who was checking that all departments had staff coverage. As a footnote, this policy changed after I left with the implementation of flexible benefits. On another occasion, we were forbidden to

go to the cafeteria for break. The rationale? We could not walk to the cafeteria, buy a coffee and return in the 15 minutes allowed. The real reason? A vice president had visited the cafeteria midday with some high-level commission members and was embarrassed by the numbers of staff in the cafeteria.

I also gave up a certain amount of freedom. My manager needed to get approval and funding for projects and he – it usually was a "he" – in turn needed to get approval on up the chain of command. There was relatively little flexibility in my schedule or intellectual pursuits. Nevertheless, initially I found the work challenges, learning opportunities, and benefits outweighed those available in the education sector. After some time, however, the demands of hierarchical control and limited flexibility began to wear thin. I decided that the corporate environment was too stifling for my needs.

LESSON LEARNED: Do not overgeneralize from a limited sample.

Later when I began consulting work and spent time in diverse organizations from high tech to government agencies, I discovered that each organization had its own culture and dynamics. Had my first corporate experience been in a different organization with a more compatible culture, I very likely would have remained in that organization, and perhaps gradually would have risen to a position of influence within it.

Three years into my utility employment, I decided that corporate environments were too inflexible and did not offer sufficient intellectual freedom for my needs. One event that sparked my decision to leave was not getting a training supervisory position for which I had applied. Even though I had better educational qualifications, the person who got the position had a long history with the organization and this outweighed my qualifications. This event was an early encounter with the politics of organizations.

A New Start

At this point, I made a two-year exit plan. During this time, I was a member of a professional society, The National Society for Performance and Instruction (now, the International Society for Performance Improvement). At that time about two-thirds of the local membership consisted of independent consultants. I got the sense that most were doing well and finding plenty of work. I decided that I would take a leap of faith and set up my own practice, giving myself a year to see if it worked for me. Feeling uneasy at jumping from a highly secure work environment to the unknown of my own business, I decided I needed a defined product to sell and that I needed to expose that product to as broad an audience as practical.

My instructional design approach was greatly influenced by Dr. David Merrill, who had been one of my professors during my doctoral program. I found his component-display theory practical and helpful. There was a lot of groundwork available on job analysis and learning objectives. But when it came to actual development, practitioners were left with little guidance. I found that Dr. Merrill's content types and level of performance filled a gap – the need for a development structure that I could teach to others – a foundation for building a robust training program.

During my final two years at the utility, I started to prepare an instructional design training program that I targeted toward subject matter experts with training assignments. The initial program was about four days in length and included job analysis, learning objectives, and development methods based on Merrill's taxonomy. I started making presentations at the annual national meetings of NSPI, which gave me exposure to an international audience.

At the end of five years at the utility, I resigned and started my own consulting practice focused primarily on training in instructional design. During my last two years at the utility, I had offered a few seminars during my vacation time to external clients. Once on my own, I contacted those few clients as well as sent letters and emails to organizations looking for instructional design help. My biggest start-up investment was a laser printer, costing $5000 at that time. Along with my computer, the printer gave me an opportunity to create professional-appearing materials.

As a result of presenting at national conferences, one of my first teaching engagements was in London. That same year, I got a second assignment that involved developing and teaching a classroom presentation skills course. The sponsoring organization asked me to teach the pilot class in Paris. I was starting to think I would have a career with lots of international work. As it turned out, these early engagements were not representative of later contracts, which were mostly in the U.S. However, had I worked to make more international contacts, I could perhaps have expanded these opportunities. If this is your interest and you are developing your own products, use caution in different countries that may not have the same copyright laws or enforcement as our own. In one such country, I worked with local providers who advised against doing any public workshops. In another, I expected my materials to be "reused" but did not plan on extensive work in that country so I accepted that eventuality. In general, I suggest working with a local representative who knows the unique features of that country and culture.

LESSON LEARNED: Be open to changes needed to meet your client's needs and meet these needs in a profitable manner.

Learn from Failures

As I reflect on events or projects that were failures, I believe 80% of these were due to my own lack of investment to clearly define the needs, values, and expectations of the target group. For example, I gave a two-day workshop in Norway in which I had designed several group information exchanges and discussions. These discussions had been generally well received in the US. However in this culture, the group did not want to talk to each other, but instead they wanted to hear from the expert. They were expecting to listen to a lecture. I should have worked closer with my contact ahead of time rather than learning of this expectation the hard way. A second example involved facilitating my needs assessment class with an audience of European managers representing an American company. The American headquarters expected these managers to work with clients assessing their needs for the sponsoring organization's products. However, the European managers insisted that their clients would never share the kind of data needed to assess performance and would never even admit they had a problem. Thus, most of my course was wasted due to these conflicting underlying assumptions.

My lesson learned was to spend much more time upfront. Use a survey and checklist as well as interviews to define the expectations, values, and constraints of clients before an engagement. If the upfront findings suggested that my approach would not fit the client's expectations, better to drop the engagement and make a referral to another resource.

In the end, the majority of my work came from U.S. organizations. Larger organizations that

liked my work often booked several workshops a year. Often, however, after having an onsite workshop, small numbers of new staff would need similar training. This led to two innovations: 1) offering public workshops to be attended by individuals, and 2) developing an online blended version of my basic ISD workshop. Offering public workshops required more formal marketing than in the past, including mass mailings and speaking at multiple conferences. It also required a greater amount of administrative support. These innovations requiring hiring staff and building infrastructure to support them.

LESSON LEARNED: Make your own development a priority.

My Writing Career

During my first year of consulting, I had extra time and decided to invest it in writing a book. Having a side project helped reduce the anxiety that comes with starting your own business. That year I wrote *Developing Technical Training* based on a synthesis of Merrill's Component Display Theory and Robert Horn's Information Mapping. I was fortunate to have the book published, and I used it as a supplement to my instructional workshop materials. Over time, I adapted a pattern of writing a book and then building workshops around it.

Following my research interests, I routinely scanned a score of key journals and kept files of research articles I found relevant to practitioners. I was influenced especially by the work of John Sweller and Richard E Mayer. I was fortunate to collaborate with both of these prolific researchers. Richard Mayer and I coauthored a best-selling textbook: *E-Learning and the Science of Instruction,* now in its 4th edition. I wanted to write books that bridged the gap between academic research findings and practice and was fortunate to partner with ATD (then ASTD) to publish *Evidence-based Training,* now in its second edition.

In my early years of reviewing research literature, I spent time in university journal stacks scanning and copying articles of interest. As journals digitized and search engines evolved, I first went to the library to use their computers to research journals and later was able to get an account for my home computer. In short, the ability to identify and download research became much more efficient. I recommend that you keep learning whether that is through the projects you tackle, the new job roles you assume, or in my case by writing.

Evidence-based Training

In my initial research reviews, I was hoping for a handful of universal instructional principles that would apply to most circumstances. By and large this expectation was overly optimistic. Instead of universal guidelines, the value of most instructional methods such as graphics, feedback, and practice will vary based on 1) prior knowledge of the learner, 2) implementation of the method itself, and 3) the instructional goal, e.g., conceptual learning versus procedural learning. Take for example the premise that graphics improve learning. This is true given the following conditions: 1) Learners with low prior knowledge in the domain will benefit most; and 2) The graphic is relevant and is rendered in as simple a manner as possible to illustrate the content. The benefits of a specific type of graphic, like an animation, may depend on the learning goal. Animations are complex graphics displaying multiple images in a short period. Evidence has shown that animations are useful for illustrating procedures but less so for illustrating processes or conceptual information.

What's in a Name?

One of our field's failing is generalizations about instructional innovations that are broad and actually

incorporate a multitude of different methods. Take games for example. While there has been a lot of enthusiasm for the use of games in workforce learning, we need to step back and define what we mean by a game. Just as a graphic may be a still or an animation, a realistic image or a metaphor, so are there a number of implementations that are all called "games." A first step is to derive subcategories of games and distinguish their similarities, differences, and appropriate uses. Even research on the same game may yield different outcomes because the game is implemented in a different manner in different contexts. A lesson learned is to substitute generalizations about meta-methods such as games with a taxonomy of core methods that define what specific elements of those methods facilitate learning in what specific contexts. Much current research is focused on this goal, and we can look forward to more nuanced recommendations.

Frequently Asked Questions:

Over my years of working with practitioners in instructional design, some common questions include:

A. Should I become an entrepreneur or work in an organization?

I believe my success as an entrepreneur relied on 1) finding a gap not otherwise being addressed, 2) being fortunate to start a business during generally economic good times, 3) persisting at my work over a long period of time, 4) gaining a baseline of skills in an organization that prepared me for working on my own, and 5) having good time and money management skills.

The downside of working on my own was missing many interesting projects and new technologies that my colleagues working in organizations enjoyed.

B. Should I work with a partner?

It's tempting to work with a partner – someone who complements your skills and boosts your overall courage to go it on your own. For me a partner with strong sales skills or technology experience would have been a great asset. At the same time, remember that a partner will also share in your profits. Will your business be profitable enough to support two or more individuals? Also consider what kind of expertise you could hire or contract rather than partner. Finally, consider your own personality and the scope of your business plan. I was able to work on my own because my business scope was relatively focused. I also benefited from work with colleagues both in my writing and in my instructional products.

C. Should I get a doctorate?

I was often asked this question, and my answer is this: only if you are especially interested in research, love an academic challenge, or desire an academic career such as teaching in a university. For most practitioners working in organizations, your skill set, however acquired, is more important than a degree.

Lessons Learned

Overall I would encourage anyone interested in a profession related to learning and instruction to pursue it. For corporate environments, the focus is on results – programs prepared and performance indicators improved. In the right organization, you will have the opportunity to try new technologies and learn new techniques. You are likely to work in and

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learn from a team. Find the right match for your talents and career needs. As in my case, your first attempts may not be right for you. Be open to move to new untested opportunities always with a backup plan in mind. Take the time to learn from outcomes that do not succeed. Take responsibility for what you could have done to mitigate negative results. Remember that any choice you make will have tradeoffs. What might work well for you at one stage of your career may not work for another. Be prepared to make changes. Always make your own learning a priority. If you are stagnating or frustrated for a long period, it might be a signal to find a new place.

About Acquired Wisdom

This collection began with an invitation to one of the editors, Sigmund Tobias, from Norman Shapiro a former colleague at the City College of New York (CCNY). Shapiro invited retired CCNY faculty members to prepare manuscripts describing what they learned during their College careers that could be of value to new appointees and former colleagues. It seemed to us that a project describing the experiences of internationally known and distinguished researchers in Educational Psychology and Educational Research would be of benefit to many colleagues, especially younger ones entering those disciplines. We decided to include senior scholars in the fields of adult learning and training because , although often neglected by educational researchers, their work is quite relevant to our fields and graduate students could find productive and gainful positions in that area.

Junior faculty and grad students in Educational Psychology, Educational Research, and related disciplines, could learn much from the experiences of senior researchers. Doctoral students are exposed to courses or seminars about history of the discipline as well as the field's overarching purposes and its important contributors.

A second audience for this project include the practitioners and researchers in disciplines represented by the chapter authors. This audience could learn from the experiences of eminent researchers—how their experiences shaped their work and what they see as their major contributions—and readers might relate their own work to that of the scholars. Tobias' chapter in this series accompanied invitations to potential authors for illustrative purposes. Authors were advised that they were free to organize their chapters as they saw fit, provided their manuscripts contained these elements: 1) their perceived major contributions to the discipline, 2) major lessons learned during their careers, 3) their opinions about the personal and 4) situational factors (institutions and other affiliations, colleagues, advisors, and advisees) that stimulated their significant work.

We hope that the contributions of distinguished researchers receive the wide readership they deserve and serves as a resource to the future practitioners and researchers in these fields.

Acquired Wisdom is

Edited by

Sigmund Tobias — University at Albany, State University of New York

J. D. Fletcher — Institute for Defense Analyses, Alexandria VA

David C. Berliner — Arizona State University, Tempe AZ

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