



Adding Value With Guides

Leading Learning Podcast Transcript for Episode 407

Celisa Steele: [00:00:00] Having a pathway to follow is helpful for learners in today's ambiguous world. Having guides along that pathway is even more helpful.

Celisa Steele: [00:00:15] I'm Celisa Steele.

Jeff Cobb: [00:00:16] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:24] We've talked about and written about and generally spouted the value of pathways for adult lifelong learners.

Jeff Cobb: [00:00:31] Yes, the third sector of education can be difficult for learners to navigate, and pathways are a way that learning businesses can help learners make sense of the choices. By offering prescribed or recommended plans for what learning experiences can lead to what ends, learning businesses provide some clarity in an ambiguous environment.

Celisa Steele: [00:00:53] And while we've talked about the value and importance of pathways, what we've talked about less is the value of guides, and so that's what we want to focus on in this episode, number 407, because guides are able to further adapt and personalize pathways for specific learners and for specific circumstances and events.

Jeff Cobb: [00:01:18] Part of what has us thinking about the value of guides is a recent trip we took, and we've talked about the value of travel before. This was a case where travel proved very valuable to us. We took a trip to Peru, which involved a six-day trek that took us through a variety of landscapes and climates before the big finale (drumroll) of Machu Picchu.

Celisa Steele: [00:01:43] Now, this is definitely not unexplored territory that we were covering.

Jeff Cobb: [00:01:49] We weren't going boldly where no one had gone before.

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Celisa Steele: [00:01:51] Definitely not. Even if we just take that big finale of Machu Picchu, over 1.5 million people visit that site every year, which means an average of around 2,500 people per day.

Jeff Cobb: [00:02:05] But, still, it was unfamiliar territory to *us*, and we weren't just going to Machu Picchu. We were hiking over a whole bunch of terrain before we ever got there, and we decided that it would be good to work with a guide to do that.

Celisa Steele: [00:02:20] It definitely was a good move for the trip. And part of what value we got out of it was thinking about the value of having a guide, the value of engaging a guide. And us being us, we started thinking about, okay, what would the role of a guide tell us about the role of guidance in lifelong learning and what a learning business might provide?

Jeff Cobb: [00:02:46] This is what both of us were thinking about as we were walking along in a highly beautiful landscape. Not really, of course, but it did get us reflecting. We came up with six takeaways about the value of guides, and we think those takeaways apply or could apply to your learning business.

Celisa Steele: [00:03:06] First up, number one is create a framework. When you set out on a long journey, there are any number of decisions to be made, and, if you're new to making that journey, if you're a novice, you don't really have a great foundation, a great basis for making those decisions, making the choices around, okay, where will I go? How long will I walk? All of those intricate details that are wrapped up in something like a six-day trek.

Jeff Cobb: [00:03:36] And so a good guide is obviously going to do that for you. They're going to create that framework for you. They're going to draw on their own expertise and past experiences, as well as what they've observed about the experience of their past clients because they've done this a whole lot before. And so that's the context of taking a trek—having that sort of guide leading you. But what could that look like for a learning business?

Celisa Steele: [00:04:02] I think surfacing and focusing in on the areas of learning that are truly most important for and valuable for your audience, that's one takeaway of what this framework could look like in the context of a learning business.

Jeff Cobb: [00:04:18] Yes, so what's perennially valuable, what's emerging—that second part around what's emerging is particularly important to that concept of leading learning. But, basically, a good guide in the context of a trek and a good guide in the context of a learning

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business is going to bring things down into an overall manageable context and conceptually give you the guidance on how to approach things. What it's going to be valuable to do in setting that smaller context, that more defined context in which you're going to pursue learning.

Celisa Steele: [00:04:55] I think one way that can manifest itself is in assessments or other ways that you help learners understand where they are and which offerings in your portfolio are going to be appropriate to them—i.e., which offerings do they already have enough background and knowledge and skills to then be able to engage in? Which ones aren't going to be too easy, and which ones aren't going to be too hard? And so that idea of helping people find what's appropriate to them, through assessments or other things, I think that's a strong example of what guiding could look like in the context of a learning business.

Jeff Cobb: [00:05:35] Of course, even knowing what to assess, what to ask—the kinds of things that are going to help people define their learning experience—that's part of creating that framework as a guide. Another way this happens or could happen is recommendations for how much to do by when—and maybe different scenarios. For example, if somebody's working full time, you might go through the material at this pace; if you're between jobs or working part time, then you might go at a different pace. But, in general, again, it's setting up those parameters for you to engage in your learning journey. To extend this metaphor, a guide in the trekking world is leading you on a journey; a guide in the learning business world is also leading people on a journey.

Celisa Steele: [00:06:21] I think those recommendations that you were just talking about, Jeff, it reminds me of the concept of atomization that we talked about when we were doing our audio book report on the latest book from Mauborgne and Kim, *Beyond Disruption*—this idea of breaking down a goal into achievable bits and parts. So, if you're going to say, "We're going to go out and hike 50 miles," that might seem overwhelming. But, when you break it down into, "We're going to do 12 miles this day and 10 miles this day, and we're going to have breaks for lunch, and we're going to have breaks for snacks," all of that, then, begins to make it seem much more doable. And what you were talking about, Jeff, in breaking down a learning plan and saying, if you're studying for a certification, for example, that could be a huge body of content, but, if you begin to break it down and say, "Okay, by the end of the first month, you need to have covered these concepts, and then the second month you're going to move on to these," that begins to make it much more attainable and doable.

Jeff Cobb: [00:07:19] So that's the first way in which a guide can be truly valuable, helping to create that framework, providing you with a more defined space within which to work and

approach navigating that space. And then, of course, you are actually navigating that space; you're taking a pathway through it. And that's the second big thing that a guide does for you is help to manage that path. There were extended periods along the trail when we were doing the trekking in Peru thing, where the guide was nowhere in sight, but that was possible because we were on the right path in the first place. At points where the path was not as clear, the guide would point the way. And, given all that's happened in Peru during the rainy season, there were times when the path was completely covered by landslides. In those cases, the guide—and this was in collaboration with other guides—led efforts to re-create a path across those landslides.

Celisa Steele: [00:08:18] Also know that the same approach to the path didn't always work for everyone. At the highest altitude part of our trip, where there was the steepest incline, the guide recommended horses for a couple of people in our group, and that was based on him having observed us doing a shorter high-altitude hike the day before, and so he was able then to make targeted recommendations for each person. For some, he thought, "You'll be fine. Tomorrow you can do that high-altitude, longer, uphill, fairly strenuous, challenging hike." For others, he thought, "You know what? You might not actually enjoy doing that. Or it might be you pushing you beyond your limits, but we have this option where you can take a horse to the top and then walk down."

Jeff Cobb: [00:09:07] And that's, again, based on what we were saying before, that the guide has expertise. The guide has observed many other people go through this journey, this experience before and can then draw on that to help to manage the path for each of the travelers. Again, what might this look like for a learning business? How do we extend this metaphor into our day-to-day work?

Celisa Steele: [00:09:28] I think that managing the path, in the context of a learning business, could look like more personalized feedback on progress. If you begin to notice that a learner is going through material more slowly than anticipated or if performance on assessments is lower than anticipated, then that would be a moment to recalibrate. Similarly, if a learner is flying through all the content or scoring perfectly, it might also be a sign that it's time to recalibrate and perhaps offer something more challenging in that case—obviously less challenging in the case of someone moving slower or not performing as well. But it's really about assessing the progress that individual learners are making and then refining, recalibrating as needed.

Jeff Cobb: [00:10:16] Similar is helping that learner to self-assess and be self-aware. So try out this test, which, the corollary in the trekking world, might be a short hike, as opposed to taking

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on the whole Salkantay trail, which we did. Try something out first to see how you do, and then that's going to help you predict how you're going to do on the big test, the big exam, or in this case, the longer, the bigger hike that we ended up taking.

Celisa Steele: [00:10:44] This might be a good place to note that, while we're talking about guides—we're talking specifically in our trek about an actual person as guide—what we're talking about with learning businesses is guidance in general, which might be provided by people, by facilitators, by instructors. But some of this may also be baked into your technology, for example. And you might be looking at data, looking at reports that come out of your learning technology platform, to see, okay, is this person slowing down or not? And so, it could be more automated. We're talking about guidance and guides somewhat metaphorically—could be people; could also be other ways in which you're providing that guidance.

Jeff Cobb: [00:11:28] Of course, this is one of the big potential areas for something like artificial intelligence—it can play that guide role in a highly scalable basis. You've got to have the data there. You've got to have the good practices in place to support that happening. But once it does, AI as guide is a very powerful concept.

Jeff Cobb: [00:11:50] At Tagoras, we partner with professional and trade associations, continuing education units, training firms, and other learning businesses to help them understand market realities and potential, to connect better with existing customers and find new ones, and to make smart investment decisions around product development and portfolio management. Drawing on our expertise in lifelong learning, market assessment, and strategy formulation, we can help you achieve greater reach, revenue, and impact. Learn more at tagoras.com/more.

Celisa Steele: [00:12:28] Our third takeaway from our trekking experience is that a guide can help focus your attention. When you're hiking through mountains, and you're doing that day after day, there's a lot to take in, and there's a lot that can capture your eye. It's good for hikers to be free to let their minds wander and take in whatever part of the scene strikes them, but there are also things that you want to make sure that a hiker doesn't miss on a journey.

Jeff Cobb: [00:13:00] For example, the huge variety of orchids that grow in the Peruvian jungles. They're everywhere. I had no idea. But our guide helped us to tune in to the many different varieties along the way. And, of course, now I'm aware that there are even many more that we haven't seen yet and probably do a little more looking on that.

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Celisa Steele: [00:13:21] A good guide will call your attention to things like that, things that you might not have noticed—one or two kinds of orchids, some of the bigger, flashier ones growing closer to the trail, you might notice. But, when they can pull back the foliage and show you the tiny little orchid right there, you begin to have a new appreciation for that particular environment, that particular climate. That’s a great example of a guide calling your attention to something that you might have overlooked if left to your own devices.

Jeff Cobb: [00:13:50] Right. So orchids, learning business—how do we tie these two things together?

Celisa Steele: [00:13:57] One area would be around pruning, which continues the vegetation analogy. We know from all that learning science has taught us is that pruning learning content down to the essential is so, so important, so that we’re not overwhelmed by extraneous information as learners. You really want to prune so that you can focus in on what’s most important. In the case of the guide with the orchids, part of that is literally parting the leaves to call your attention, forefronting that little tiny orchid that’s down there and allowing you to appreciate it. In the context of learning then, it is about making sure that you are not hiding the key content and the key information by having too much there. It is about pruning, so that then what’s left is visible, is on display, is going to be something that the learner won’t miss.

Jeff Cobb: [00:14:53] Yes, and we talk about this a lot in the “Presenting for Impact” course that we’ve made to help subject matter experts improve the educational impact of their teaching, and this whole process of getting attention in the first place and then maintaining it. Pruning is a big part of that. If you put too much in front of people, they don’t know where to put their attention. You have to guide them to where to focus that attention and use both art and science. And how you do that—whether it’s through how your slides are created, how you stand in front of the room and present yourself, or whatever the particular teaching and learning medium is—really paying due attention in how you’re going to earn that from the learners and keep focusing it in the right way throughout the experience.

Celisa Steele: [00:15:40] The fourth takeaway we have is that a good guide will challenge you. They’ll challenge the learner. A guide is not there to passively go along for the ride. No, the guide is there, an active participant observing what you’re doing, trying to figure out when, where, and how to push you a bit, but, of course, also doing that in a supportive way.

Jeff Cobb: [00:16:08] Yes. On one day, for example, we had to cross the Urubamba River twice using a pretty rudimentary, hand-towed cable car. This was the end of the rainy season, so it was really a raging river. The water was flowing very, very fast.

Celisa Steele: [00:16:25] And fairly high up above the water as well. Probably 40 feet.

Jeff Cobb: [00:16:30] Forty or 50 feet up, and you've got this churning water going underneath you. One of the hikers, a person who was in front of me, was clearly frightened of doing this, which is certainly understandable. But one of the guides really encouraged her and rode across with her both times. I'm sure that, when she looks back on that experience and tells friends and family about it for years to come, that's going to be something she talks about.

Celisa Steele: [00:16:55] Another example was, we mentioned already, in the rainy season, there were landslides that closed the path in multiple places. And, yes, we used the cable cars in a couple of places to get around some landslides. But the other approach was the guides re-hacked a pathway across the landslide. So you're walking across land that had just recently fallen. That also gave some hikers pause, to be walking across that landslide that seemed like it might begin to slide again. There was at least one hiker that I saw who balked at crossing, and so a guide went across, held her hand, and led her across. Again, it's this idea of really being there, providing support, being attuned to what any individual is feeling, and figuring out, as a guide, what support can you offer? What can you do that will make it feel manageable?

Jeff Cobb: [00:17:55] This speaks to how important trust and authority are for guides because I'm not going to just follow somebody across a new path through a landslide or go across a raging river on what looks like a flimsy cable car unless I trust that these people know what the hell they're doing and that they have the authority to say that this is something to do. And you know that they've done it before many times, that they're not going to take a risk. They'll be risking their own lives and health in this. So they have to earn that trust. They have to have that recognized authority to be effective as guides.

Celisa Steele: [00:18:35] In the context of learning and learning businesses, this correlates, in my mind, to appropriate challenge, and that's a really big deal in learning. If something's too easy, then there's not really going to be any growth or learning because the learner doesn't really have to engage and apply herself. If it's too hard, then the learner may give up, throw her hands up, and walk away. Again, no real growth or learning. So there's a lot about pitching the learning experience to the appropriate level for the learner. Jeff, I know this came up in your recent conversation with Clark Quinn, that importance of pitching the right level for the learner.

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Jeff Cobb: [00:19:15] It did. It's so important in practice and application, which themselves are such important concepts to learning that often don't get the attention that they should. And often wrapped up in that are emotions. Emotions are a big deal that, again, often don't get as much air time, as much attention as they could. But, to go back to that example of crossing the landslide or the woman who was struggling with the cable car, there's a lot of emotion wrapped up in that. Some of that was some genuine fear, obviously some anxiety that was at a manageable level. It was at the appropriate level of challenge. You could get past it. But that core emotion, being there, is a big part of what makes that experience memorable. It's going to cement it into long-term memory and be something that somebody carries forward with them. That's integral to effective learning.

Celisa Steele: [00:20:07] That also came up in your conversation with Clark Quinn—the importance of emotion and how we tend to focus too much on cognition without paying attention to the fact that, if emotion is not managed, if it's too high, then it may actually interfere with cognition. A little bit of anxiety, a little bit of fear may actually help with learning, but, if it's too much, then it's going to tip over, and someone's not going to be able to pay attention and actually do what is required of them. It's that balance. I think again a good guide is going to pay attention not only to the cognitive aspect and whether something is too hard or too easy, but also the emotional side. Is it too stressful? Is it too anxiety-producing to be useful?

Jeff Cobb: [00:20:51] Right. To briefly recap where we are so far, that good guide is going to create the framework, the overall approach to the experience; is going to manage the path through the experience, not dictate the path, mind you, but manage that path or help you manage that path. It's going to help with focusing your attention in the most meaningful and valuable ways. It's going to challenge you, as we were just talking about. And then, the fifth one, a good guide is going to help you celebrate.

Celisa Steele: [00:21:19] The guides would typically hold up their hands for high fives at the end of particularly hard climbs, or you got to the summit, high five, or they'd say, "Okay, here we are. Here's this beautiful scenic spot. Stand here for a picture." Again, they're trying to help us see our accomplishment and celebrate with us that we've achieved something.

Jeff Cobb: [00:21:40] Our particular guide had an approach to taking photos where he would—or videos, really. He would start the video, then walk towards you, and then have the camera swoop over the top of you so it looked like a drone or something was diving in to take the video of you, which was very effective. We all appreciated it. And there are other things too. One

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afternoon—this is probably about halfway through—we’d done most of the big hikes that we’re going to do, and there was an afternoon where we were able to go to some hot springs, and this happened to be after we’d been spending the day crossing landslides, lots of distance, lots of stress, and being able to essentially celebrate a little bit by sitting in some warm, hot springs water was a great thing.

Celisa Steele: [00:22:19] What does helping learners celebrate look like for a learning business? I think one obvious way is that, especially along those longer pathways, say, working towards a certification, you want to celebrate the accomplishments that a learner makes along the way. Rather than waiting until they actually pass that certification exam, which might be a year down the road, you want to help them celebrate, as they’ve maybe taken a practice test or as they’ve covered a certain amount of content in their review. You begin to help them see what they’ve already achieved and build some momentum to continue to carry them forward.

Jeff Cobb: [00:22:56] Yes, definitely. We got a little certificate at the end that said we had accomplished this, which I wasn’t really even expecting, but, to be honest, a fist bump up at 15,000 feet on the Salkantay trail probably meant a whole lot more to me than that certificate’s ever going to mean. Often these things are extrinsic. They’re these little gestures, tokens, that sort of thing. But, hopefully, you’re really tying them into. You’re tapping into the learners’ intrinsic motivation as you’re doing it. These guides know it. At the point that we’ve gotten up to 15,000 feet, and they’re giving us that high five, internally, we know we’ve done something that got us there. And, really, the high five is just the exclamation point on it, so to speak.

Celisa Steele: [00:23:37] Our sixth and final takeaway that we’re going to offer is that a guide, a good guide, has you do. There’s nothing theoretical about hiking 50 miles. Every day you have to get up, and often you have to get up very early. There was a 4:30 a.m. wakeup call many mornings.

Jeff Cobb: [00:23:56] More than once, yes.

Celisa Steele: [00:23:57] You have to get up, put on your boots, grab your hiking poles, and then you put one foot in front of another. This isn’t about just studying the map and thinking about the pathway. It’s about actually walking the pathway.

Jeff Cobb: [00:24:12] That’s so true because I can remember studying the map. We had the map of what we were going to do, and it’s a pale shadow of what it’s actually like to do it. It was

helpful, but, still, as you said, it's the actual doing that helps. And so, once again, we can tie this back to good practices for learning businesses.

Celisa Steele: [00:24:32] What having you do might look like in a learning business is practice and application and making sure that you're building that into your learning experiences and giving your learners chances to think about how concepts apply to their lives and their jobs—and not just think but actually do something related to that.

Jeff Cobb: [00:24:57] We have a briefing we should mention, "Practice Makes Profit," which goes into how important practice is as part of creating impactful learning experiences that are going to attract learners back, again, time over time, they're going to be willing to pay for learning experiences, their employers are going to be willing to fund. So this doing as a path to learning is extremely important.

Celisa Steele: [00:25:24] Again, this guidance that we've been talking about may take the shape of humans—human guides, instructors, facilitators—helping your learners. It may be more built-in, baked into some of the technology. It may leverage AI. It may leverage other data that you have. But the idea is to think about not just providing the pathway but to also think about how can you guide your learners in their progress along that pathway and making the appropriate decisions for them as they move along that pathway.

Jeff Cobb: [00:26:00] Right, and this is all part and parcel of good, effective instructional design. To go back to my conversation with Clark Quinn, this really gets at a lot of what he talks about when he talks about making experiences meaningful for learners. When you're doing that, when you're making the experiences meaningful, you are serving these functions. You're doing these things that we've just described as a good guide.

Celisa Steele: [00:26:27] I will mention now, too, that if you check out the show notes for this episode at leadinglearning.com/episode407, we'll be sure to include a few photos of the trek.

Jeff Cobb: [00:26:36] I'm sure they will be stunning.

Celisa Steele: [00:26:47] Having a pathway to follow is helpful for learners in today's ambiguous world. Having guides along that pathway is even more helpful. So think about how your learning business might offer both pathways and guides to help your learners.

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Jeff Cobb: [00:27:03] At leadinglearning.com/episode407, you'll find a few pics from our trek, show notes, a transcript, and options for subscribing to the podcast. And if you haven't yet, please subscribe.

Celisa Steele: [00:27:17] We'd be grateful if you would take a minute to rate us on Apple Podcasts or wherever you listen, especially if you enjoy the show. Jeff and I personally appreciate reviews and ratings, and your reviews and ratings help the podcast show up when others search for content on leading a learning business.

Jeff Cobb: [00:27:34] And please spread the word about Leading Learning. You can do that in a one-on-one exchange with a colleague, or you can do it through social media. In the show notes at leadinglearning.com/episode407, you'll find links to connect with us on X, LinkedIn, and Facebook.

Celisa Steele: [00:27:50] Thanks again, and see you next time on the Leading Learning Podcast.

[music for this episode by DanoSongs, www.danosongs.com]