



CLIENT HANDBOOK

CONSULTANT PLANNING GUIDE

LEARNING TOGETHER - BY DESIGN

2022 / 2023

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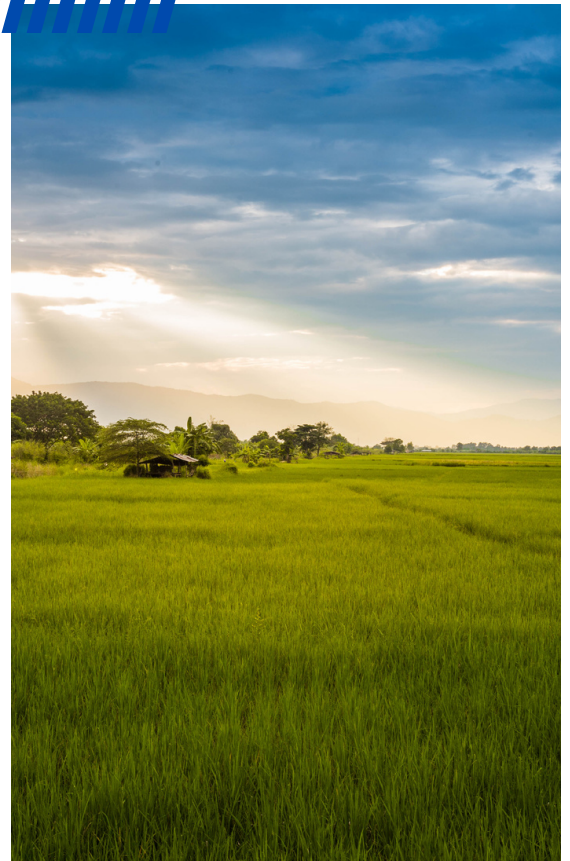
Territorial Acknowledgement

Learn by Design Consulting Group would like to acknowledge the benefits that its team members have reaped through their opportunities to work, live, and play on the traditional territories of the following Indigenous groups:

The traditional and unceded territory of the Ktunaxa, the Kinbasket (Secwepemc), Syilx, and Sinixt Peoples.
(Lisa Arlint - British Columbia).

Treaty 6 territory and the homelands of the Métis Nation - Welcome, Edlanet'e, Anin Sikwa, tawâw, Hau Koda, & Tanshi. I respectfully recognize the Indigenous peoples of these lands as part of my ongoing commitment to good relations and a reconciled future.
(Heather Mohr - Saskatchewan).

Treaty 7 territory, the traditional home of the Blackfoot Confederacy, including the Siksika, Piikani, and Kainai, the Tsuut'ina Nation and Stoney-Nakoda Nations, including the Goodstoney, Chiniki, and Bearspaw, and the People of Métis Nation of Alberta, Region 3. (Rut Castillo - Alberta).



Learn by Design

Consultation Team

Company Background



Learn by Design was founded as a result of the pressing need that currently exists in the field of Organizational Workplace and Learning - improved learning experiences. The need for experienced Consultants with varied life and work expertise led to the creation of the LBD team you see today.

Our Core Values

Growth Always: We embrace the power of 'yet'. We may not have all of the answers, however, we invest the time, focus, and effort to continue to grow. A growth mindset is crucial to us in our work.

Remain Curious: We believe in remaining curious, asking great questions, and exploring possibilities to learn together with each other.

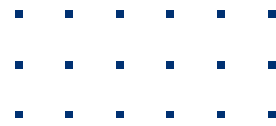


Lead With Heart: Connecting with others and building strong relationships is essential to what we do.

Walk the Talk: We recognize that the best forms of knowledge are practical, implemented, and applied.

Stronger Together: We strive to foster environments of collaboration, partnership, and trust, where all opinions matter and all voices are heard. We celebrate and embrace diversity, finding ways for all to belong.

Meet The Team



Heather Mohr

Consultant

Precise - Innovative - Future-Focused

Creating opportunities for your team to shine is what gets me up in the morning - that and a steaming cup of black coffee! I've been designing and delivering training materials for almost 10 years and every day is a new and exciting adventure.

Interactive and engaging online learning platforms are my creative canvas, along with skillfully identifying the abilities glistening within the hearts and minds of your team members. Together we will tailor a path to learning success based on their current (and future) roles in your organization.

When I'm not at work you will find me elbow-deep in bread dough, cruising down the highway on my motorcycle, or digging my sled out of a snowbank - although I'm never too far from my phone if inspiration strikes! If a plan looks too daunting to you, we are here to remind you how we eat an elephant - "One Bite at a Time".



Lisa Arlint

Consultant

I have been surrounding myself with all things learning for the past two decades. Throughout my career, I have had the opportunity to develop a diverse skillset in the field of learning and development. I have over 15 years of experience designing creative, innovative, and engaging learning

solutions for a variety of industries including healthcare, government, and hospitality. I am passionate about applying adult learning principles, instructional design theory, and design thinking strategies to enhance the learning experience and build learner capability. As an Instructional Designer, eLearning Developer, and Learning & Development Strategist, I strive to create meaningful, memorable,

Meet The Team

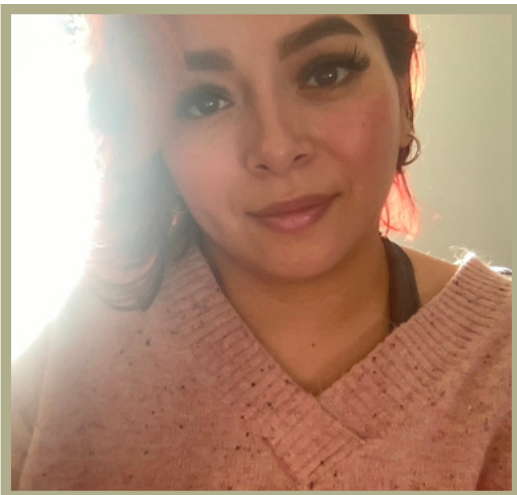


Lisa Arlint, cont'd

and engaging learning experiences and aim to make learning as simple and effective as I can for each and every individual. Driven by curiosity and a design-thinking approach to problem-solving, I insist on understanding the big picture to deliver the right details.

When I'm not working, I can be found:

- exploring the great outdoors
- enjoying a good cup of coffee
- experimenting with new recipes
- pretending to know the words to random 90's songs. #musiclover
- planning out my next travel adventures
- playing the role of Instagram-tographer for my two French Bulldogs #divas.



Rut Castillo

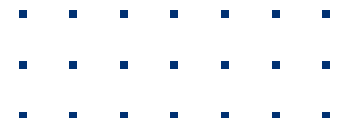
Consultant

Exciting - Challenging - Rewarding

I love the transformational process that being a parent has brought me. As I reflect on mothering as my personal site of learning, the skills I have developed here have led to my continued efforts to learn and grow. There is never a dull moment to be had!

I enjoy the learning process and look forward to assisting you as I continually add to my repertoire of current skills. I enjoy helping others and never shy away from sharing the principles of Adult Learning that are under-utilized, practical, and catalysts for meaningful change. My learning and development approach is reassuring but realistic. I am a constant encourager and appreciate balance. If it doesn't work for you or the team, I will be the first to let you know! If I wasn't at work, I would be spending time with my family, playing video games, or reading a book.

Vision and Mission



Vision



Backed by the science of how people learn, we inspire change through transformative learning experiences to empower people to aspire for more, to do better, to be better.

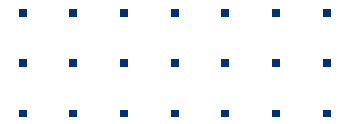
Mission



Everything we do stems from a simple idea: if we design a better learning experience together, we'll get better results. Workplace learning and development doesn't need to be boring - let's shake things up for your people and give them what they need to excel in their job.



Our Principles

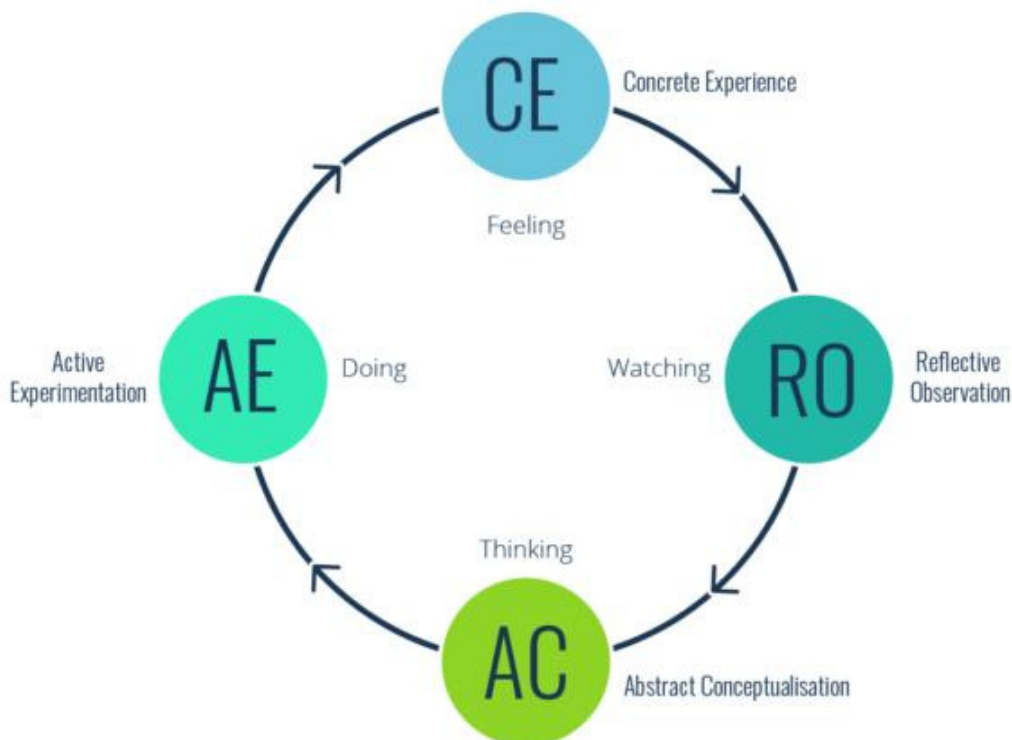


1 Learning Should Create Change

It's much more than delivering information! Learning is "a process that leads to change, which occurs as a result of experience and increases the potential for improved performance and future learning" (Ambrose et al, 2010, p. 3).
It's about empowering learners to grow their skills and abilities.

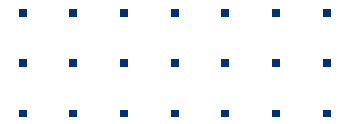
2 Learning is a Process

"According to Kolb, experiential learning can be defined as a learning process where knowledge results from the combination of grasping and transforming an experience... Kolb created the Experiential Learning Cycle [which] views learning as an integrated process. Effective learning is a cyclic process that involves experiencing, reflecting, thinking, and acting." (Virtanen, 2022).



Text and image taken from:
<https://www.growthengineering.co.uk/kolb-experiential-learning-theory/#:~:text=According%20to%20Kolb%2C%20experiential%20learning,a%20wide%20range%20of%20situations.>

Our Principles



3 Learning Should Meet People Where They Are At

Rather than creating one-size-fits-all learning, we look at the background of learners to ensure that the learning solution is designed to support the needs of all individuals, which includes designing with inclusiveness and accessibility in mind.

According to adult learning theorist Malcolm Knowles, 4 principles of andragogy (adult learning) are needed to maximize adult learning. Learning occurs best when:

- It is self-directed and involves the learner
- It is considerate of past experience
- It is relevant to a learner's current situation
- It is problem-centered

Knowles reiterates that none of this matters if learners are not ready to learn.

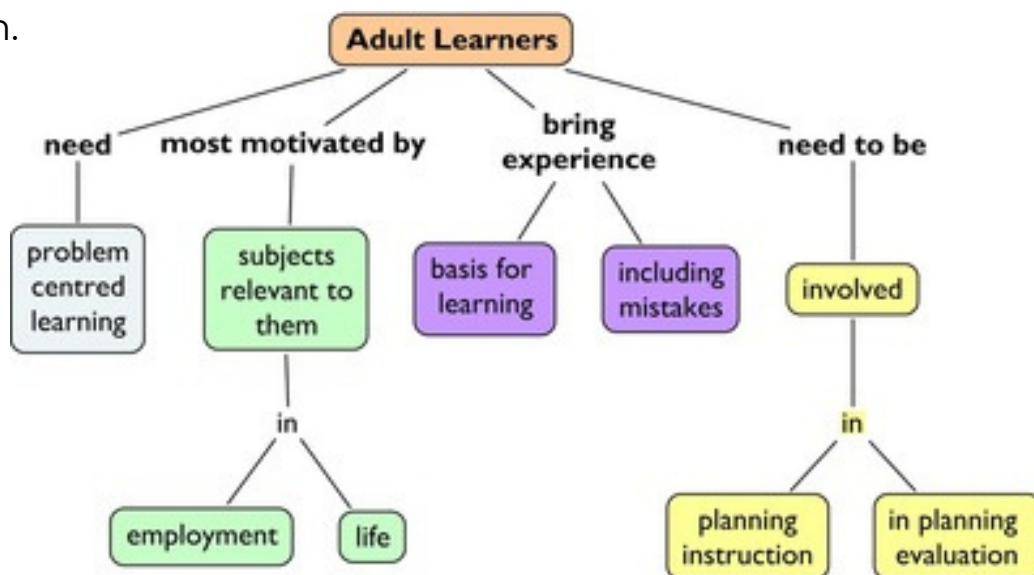
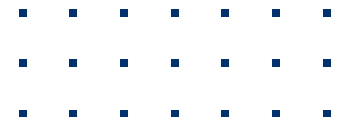


Image taken from: <https://www.teachingandlearningnetwork.com/adult-learners.html>

As such, Learn by Design is ready to perform a thorough Needs Assessment for you and your organization, to meet you at your point of need. A "Needs Assessment" is a process we use to determine organizational gaps, the cause of these gaps, and the creation of a potential plan that we will use to address the gaps.

Our Principles



4

Learning Works Best When Well-Designed

Well-designed learning experiences are more impactful. Here at Learn by Design, we use the ADDIE instructional design model to help us determine the perfect blend of design strategy, instructional technique, and appropriate technology. We also integrate Mayer's principles of design, and visual communication tools into each of our projects. So... what are they?

The ADDIE model of instructional design is incredibly popular and the model most often used by training developers. This model incorporates the use of an acronym to outline the design steps seen below:

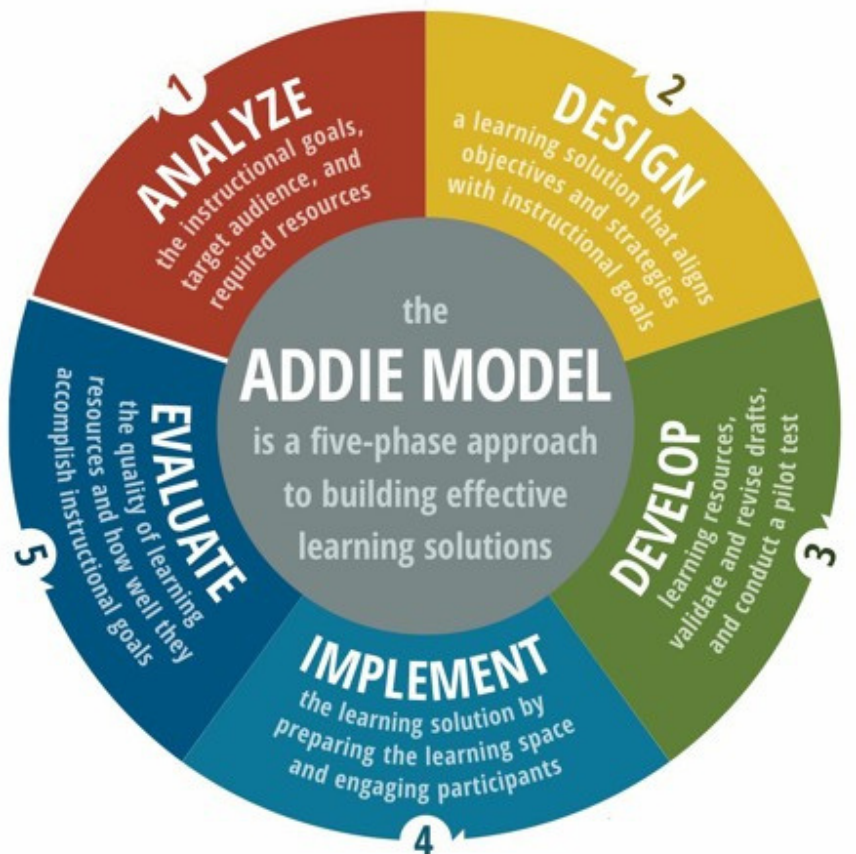
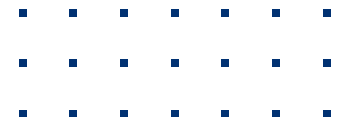


Image taken from: <https://soundcloud.com/teresa-1563/the-addie-model>

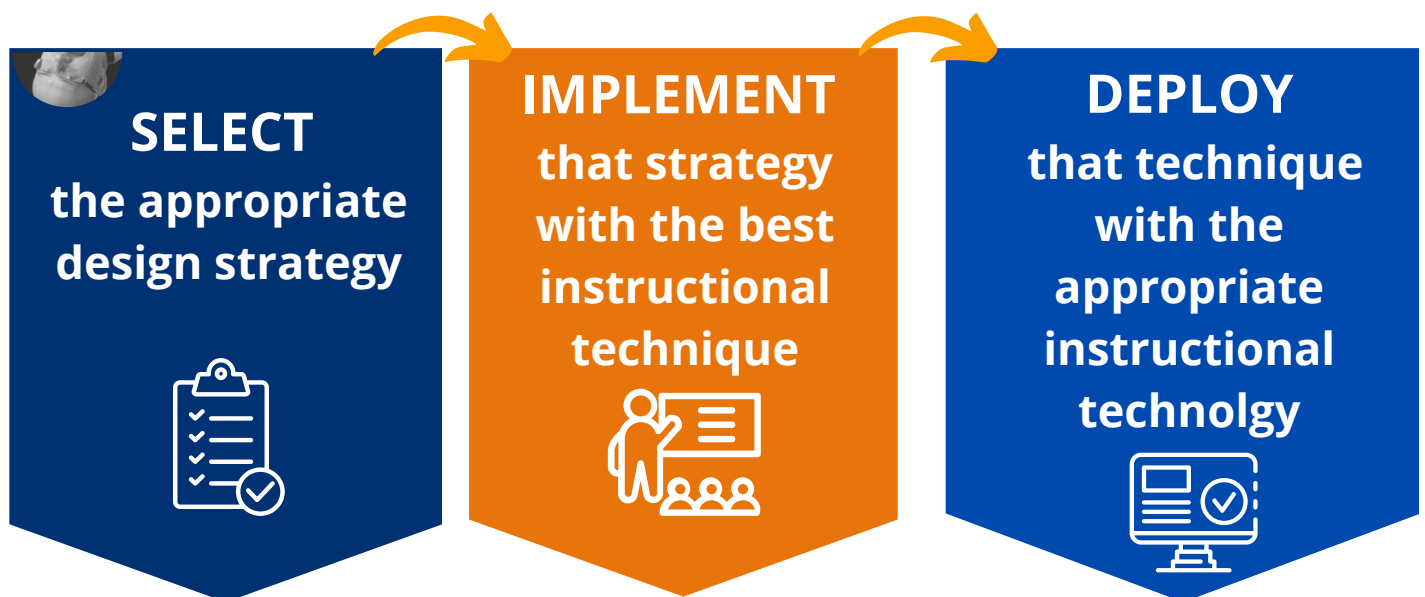
Our Principles



4

Learning Works Best When Well-Designed

We do our best not to get caught up in jargon, but there is a lot of thought that goes into designing the most optimal learning solution to meet the needs of your organization and learners. This includes determining what combination of instructional strategies, techniques, and technologies we will use.

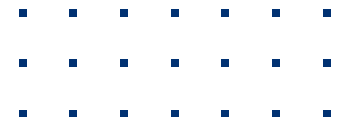


What **instructional strategy** should be used to help learners achieve the desired level of mastery for that specific learning objective?

What **instructional technique(s)** should be used to implement the instructional strategy?

What **technologies and tools** should be used to support the instructional techniques?

Our Principles



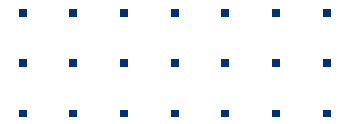
4

Learning Works Best When Well-Designed

Mayer's principles of design emphasize that "[w]hen it comes to learning, the human mind is a dual-channel, limited-capacity, active-processing system." (Davis, 2020).



Our Principles



4

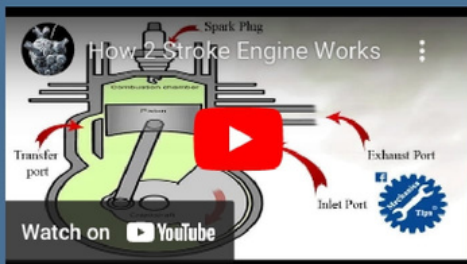
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05

TEMPORAL CONTIGUITY

Animations and videos running simultaneously with audio



06

SEGMENTING

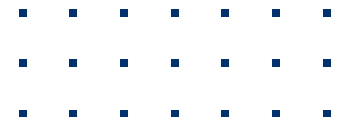
Learn in short chunks and let the learners control the pace



MULTIMEDIA LEARNING INVOLVES USING (2) DIGITAL MODALITIES AT THE SAME TIME (E.G. ANIMATIONS AND AUDIO) TO MAXIMIZE LEARNER COMPREHENSION.

RETRIEVED FROM [HTTPS://WWW.LINKEDIN.COM/PULSE/HOW-USE-MAYERS-12-PRINCIPLES-MULTIMEDIA-LEARNING-EXAMPLES-DEBELL/](https://www.linkedin.com/pulse/how-use-mayers-12-principles-multimedia-learning-examples-debell/)

Our Principles



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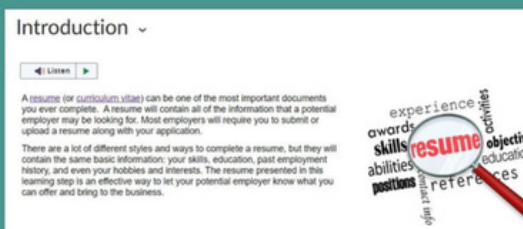
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07

PRE-TRAINING

Introduce the basics before the course begins



08

MODALITY

Utilize visuals and spoken word (instead of text)



09

MULTIMEDIA

Use images and words instead of just words alone



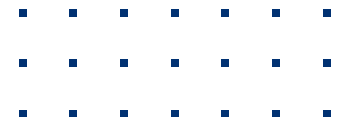
10

PERSONALIZATION

Keep the message (and voice) casual and simple



Our Principles



4

Learning Works Best When Well-Designed

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11

VOICE

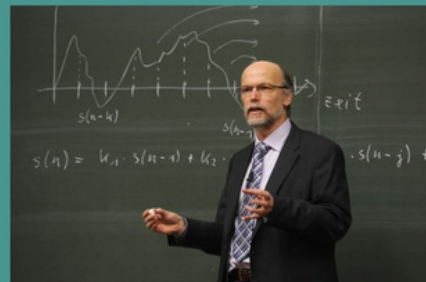
Use a human voice for audio and narration - no robots!



12

IMAGE

Limit the use of "talking heads" - use visuals and animations

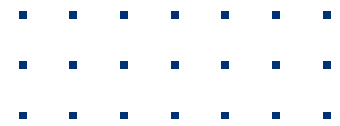


LEARNING TOGETHER - BY DESIGN



BACKED BY THE SCIENCE OF HOW
PEOPLE LEARN, WE INSPIRE CHANGE
THROUGH TRANSFORMATIVE LEARNING
EXPERIENCES TO EMPOWER PEOPLE TO
ASPIRE FOR MORE,
TO DO BETTER,
TO BE BETTER.

Services We Offer



1

Needs, People, and Organizational Analyses

Let's get back to basics and work out what you really need. We will help you define the goals and scope for your project, evaluate the skills and learning you already have in place, and determine whether the employee roles that currently exist are meeting organizational needs – before building a plan together that will meet your organization's learning goals.

2

Custom Learning Solutions

We will embrace your business challenge and develop a unique learning solution that meets the needs of your stakeholders and learners.. As we learn more about your needs, we will work to customize the perfect blend of flexible learning solutions, which may include eLearning, Instructor-led training, offered virtually or face-to-face, and performance support resources as we understand that learning is an ongoing process, not a one-time event.

3

Training Evaluation

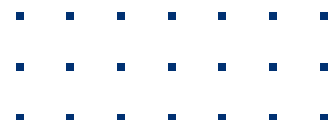
Training without measurement is not a valuable investment. Do you know which elements are actually having an impact on job performance, culture, or your team's ability to meet organizational goals? We can help you build an evaluation plan right from the start.

4

Learning Consultations

Struggling to find engaging and interactive or qualified instructors can be daunting and frustrating. We can help you train the right people for the right jobs by offering consultations grounded in the principles of Adult Education.

Analyzing Needs



What course of action should I take?

1 Plan Effectively

A good plan is S.M.A.R.T!

- **Specific:** What is it supposed to achieve?
- **Measurable:** What learning outcomes are going to be met?
- **Attainable:** Are the goals practical given the restraints (such as money, time, and resources)?
- **Relevant:** Do they currently align with previously established goals? Does the training align with the outcomes?
- **Timely:** Is there a deadline? When are the goals expected to be achieved?

2 Determine Needs

At the start of every project, we will work with you to help identify the *problem you are trying to solve* to ensure that we can set learning outcomes that reflect real behaviour change.

Together, we will identify gaps or desired requirements that may or may not currently exist in your organization. Afterward, we will define objectives, determine goals, assess current resources, and come up with a customized feedback or evaluation plan that best suits your needs.

Bloom's taxonomy is the framework we use to help clarify learning goals, to ensure that we focus on incorporating the right content and activities to create lasting behaviour change.

Analyzing Needs

What course of action should I take?

3 Measure What Matters

An important part of analyzing your needs also includes a conversation about evaluating what success looks like for you.

We like to know where the learning solution hit the mark, and what might need to be adjusted so we can continuously improve.

We use the Kirkpatrick Model to analyze the effectiveness of the learning experience, and better determine whether learning is being transferred back on the job to improve performance and change behaviour.

Let's work together to create an evaluation plan that will work for you.

Kirkpatrick Evaluation Model

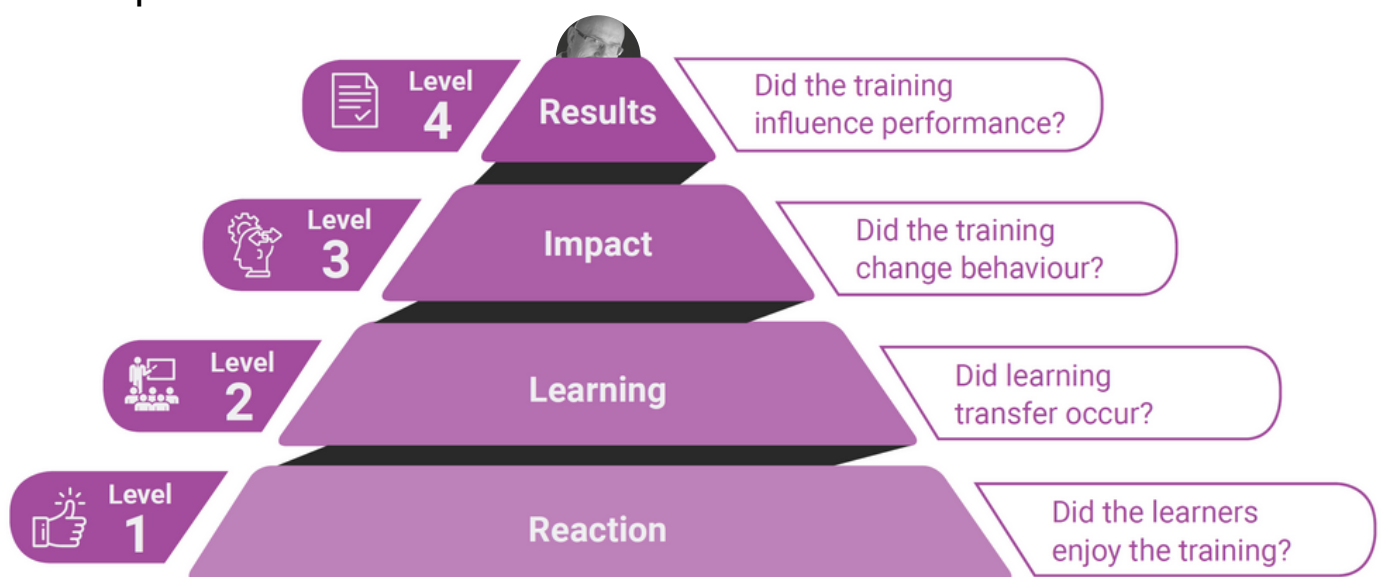


Image taken from: <https://kodosurvey.com/blog/how-master-kirkpatrick-model-training-evaluation>

Resources For You!

But... Where Should You Start?

Needs Analysis

If you are unsure of the process and don't know where to begin, RAND Corporation has provided an excellent resource to provide you with further clarity and direction.

Please check out their Needs and Resources Assessment tool here at this link:

<https://www.rand.org/pubs/tools/TL259/step-01.html>

Additionally, if you would like to initiate a Needs Analysis in your workplace, we encourage you to use the tool below to get you started!

LEARN BY DESIGN - WE ARE HERE TO ALIGN!		Our client Journey Maps connect you with us by narrating your desired experience. It can give an overview of the entire process, show us how you feel, or identify key needs that you would like to be met. To create your own, think about your goal and what you hope to achieve by collaborating with us!		
	Stage 1	Stage 2	Stage 3	Stage 4
Objectives		Write goals or activities you hope to accomplish		
Needs	Write some needs you want to meet			
Feelings			Write an emotion you or your team are experiencing.	
Barriers				Write potential roadblocks you foresee

Resources For You!

But... Where Should You Start?

You've Got Questions. Let's Help You Find Answers.

Unsure of the different types of learning solutions that might be available to you, or what you should consider when working with our team to create a learning solution? Review the links below to learn more:

[What is Blended Learning?](#)

[How do you know if eLearning is the right solution for you?](#)

[Don't buy off the shelf learning- personalize it!](#)

[What is the 70-20-10 model and why is it important for learning?](#)

[What is WIIFM and how can it help to improve the learning experience?](#)

[How long does it take to create learning?](#)

[Where can I find more research, webinars or resources about learning and development?](#)

What They Said

Testimonials



"The Learn by Design team knocked it out of the park, and exceeded our expectations with every aspect of the project. We are looking forward to continuing to work with them on all of our future learning projects."
- *Ruth Smith, Heartcore Group*



"Our training courses were falling flat and we could NOT understand why. I cannot thank the Learn by Design team enough for their incredibly helpful insights and professional opinions during their analysis of our organization." - *Ray James, Industrial Complex LTD.*

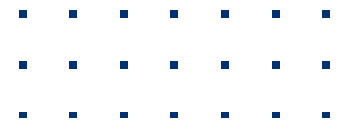


A load was taken off my shoulders when I hired the Learn by Design team to help with the improvement of our professional development courses. I was welcomed and encouraged to participate every step of the way and am glad I relented on my initial decision to do it alone. Watching the magic happen was amazing! " - *Joseph Reeves, Ontario Department of Health*



"Professional, efficient, talented. I cannot thank the Learn by Design team enough and will be using them again in the future! " - *Douglas Mauger, Coaching & Development R Us*

Our Top 10 Recommended



Technology Apps

Used By Us

Instructional Design



- Adobe Creative Suite: Illustrator, InDesign, After Effects, Premiere Pro
- Adobe Spark
- Blackboard Learn
- Canva
- DesireToLearn (D2L) Brightspace
- Articulate Storyline 360 & Rise
- Adobe Captivate
- Kaltura Capture
- SmartDraw
- edapp

For You

Education



- Zoom
- Google Drive
- YouTube
- SurveyMonkey
- Kahoot
- Canva
- Miro
- Padlet (for brainstorming)
- Grammarly
- Teams/Sharepoint

Glossary of Key Terms



- **Action Plan:** A plan used to outline the steps that will be carried out to reach goals decided on in the needs assessment.
- **ADDIE Model:** Analysis, Design, Development, Implementation, and Evaluation. A model used by training specialists and instructional designers to create effective learning experiences.
- **Bloom's Taxonomy:** action verbs designed to facilitate learning in the cognitive (thinking), affective (feeling), and psychomotor (doing) domains.
- **Finks Taxonomy of Significant Learning:** action verbs designed to provide impact in a learning experience in the foundational, application, integration, human dimension, caring, and learning to learn domains.
- **Kirkpatrick's Evaluation Model:** an established model, consisting of four levels, used for evaluating the results of training and learning programs.
- **Needs Assessment:** A process used to determine organizational or workplace needs/gaps, their causes, and potential action to address these needs/gaps.
- **People Assessment:** A process used to determine who needs learning opportunities to fill a gap or need, and what we can teach them to reduce that gap in the most effective way possible
- **Workplace Assessment:** A used to identify workplace issues and conflicts by analyzing the environment, culture, practices, and behaviors of an organization - identifying and planning practical solutions to correct those identified challenges.
- **Training:** Processes effected for the purpose of meeting short-term professional goals to complete specific job tasks.
- **Professional Development:** Processes effected to meet long-term personal and professional career goals; emphasis on the effective transfer and use of skills acquired during training.

References



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Contact Information

Still have questions? Feel free to contact us:

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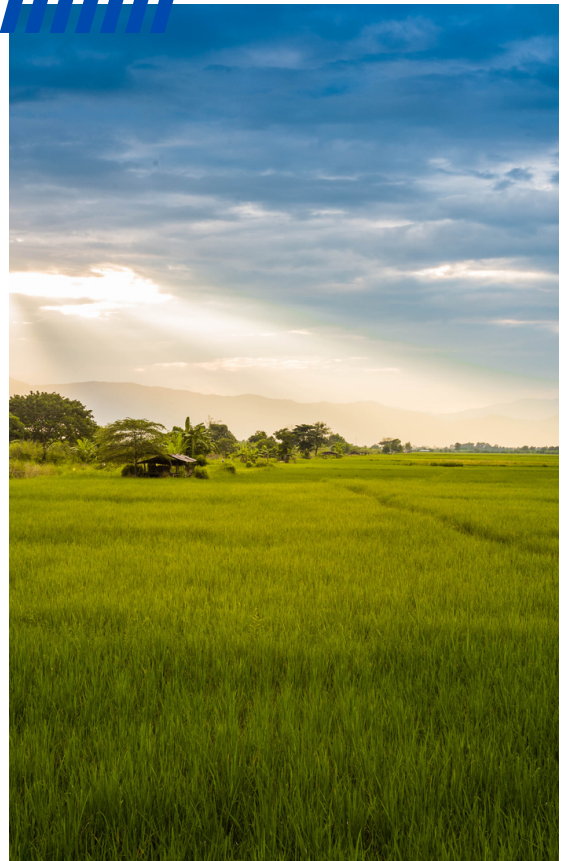
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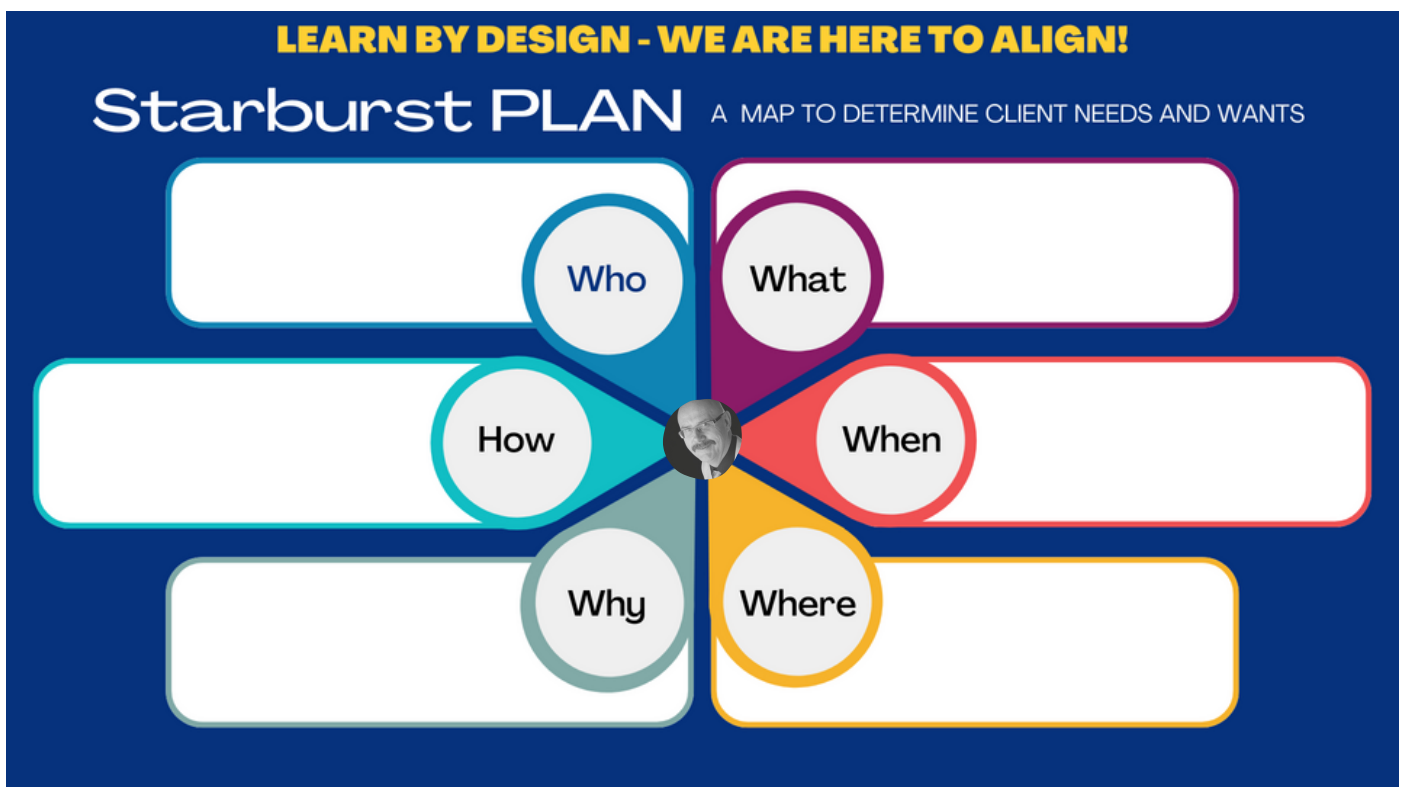
Learn by Design

Consultation Team

Consultant Resources

A compilation of resources to get you on your way!

Not sure where to start? Here is a quick map to help you determine client needs quickly during first-time consultations.



You may also consider using the 5C Framework to help you plan, design, create, and optimize your learning project.

If you're starting a new project, go through each of the 5Cs in order, downloading the free resources to get tips, checklists, templates, and guides for each stage of your project.

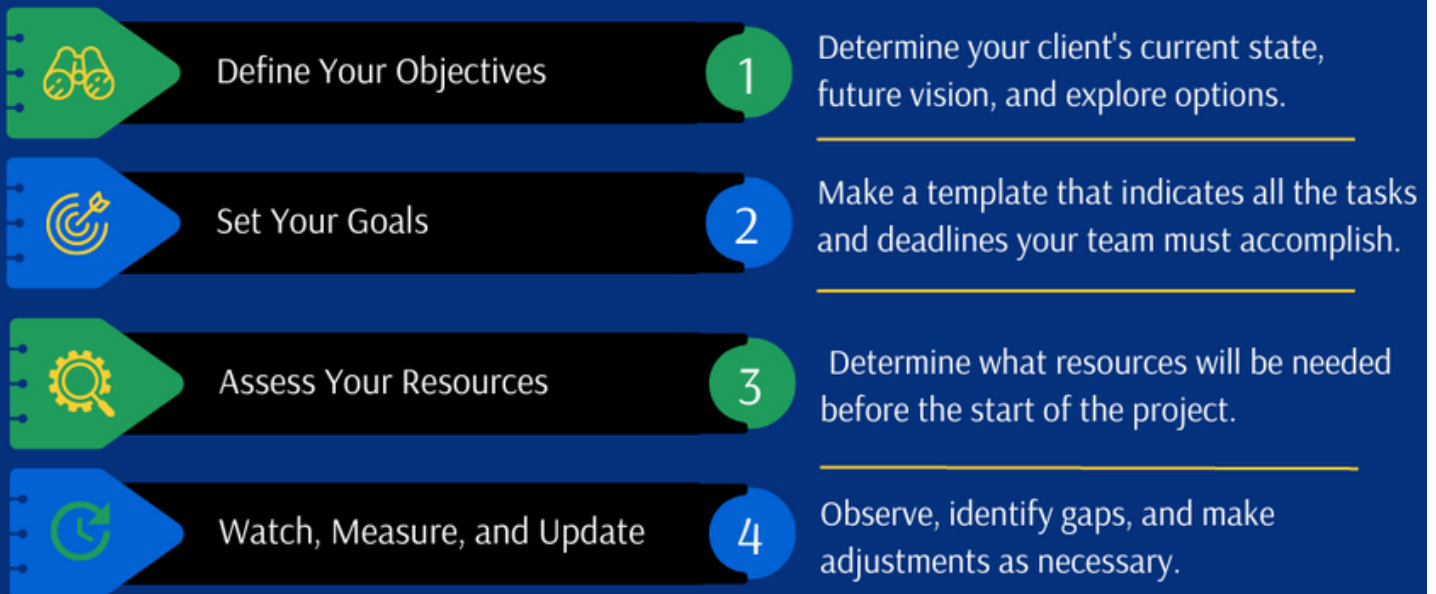
Consultant Resources

A compilation of resources to get you on your way!

Once you've determined client needs, determine the next steps and a course of action in conjunction with your client. Determine what they hope to achieve!

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Action Plan



Remember:

"A goal without a plan is just a wish!"

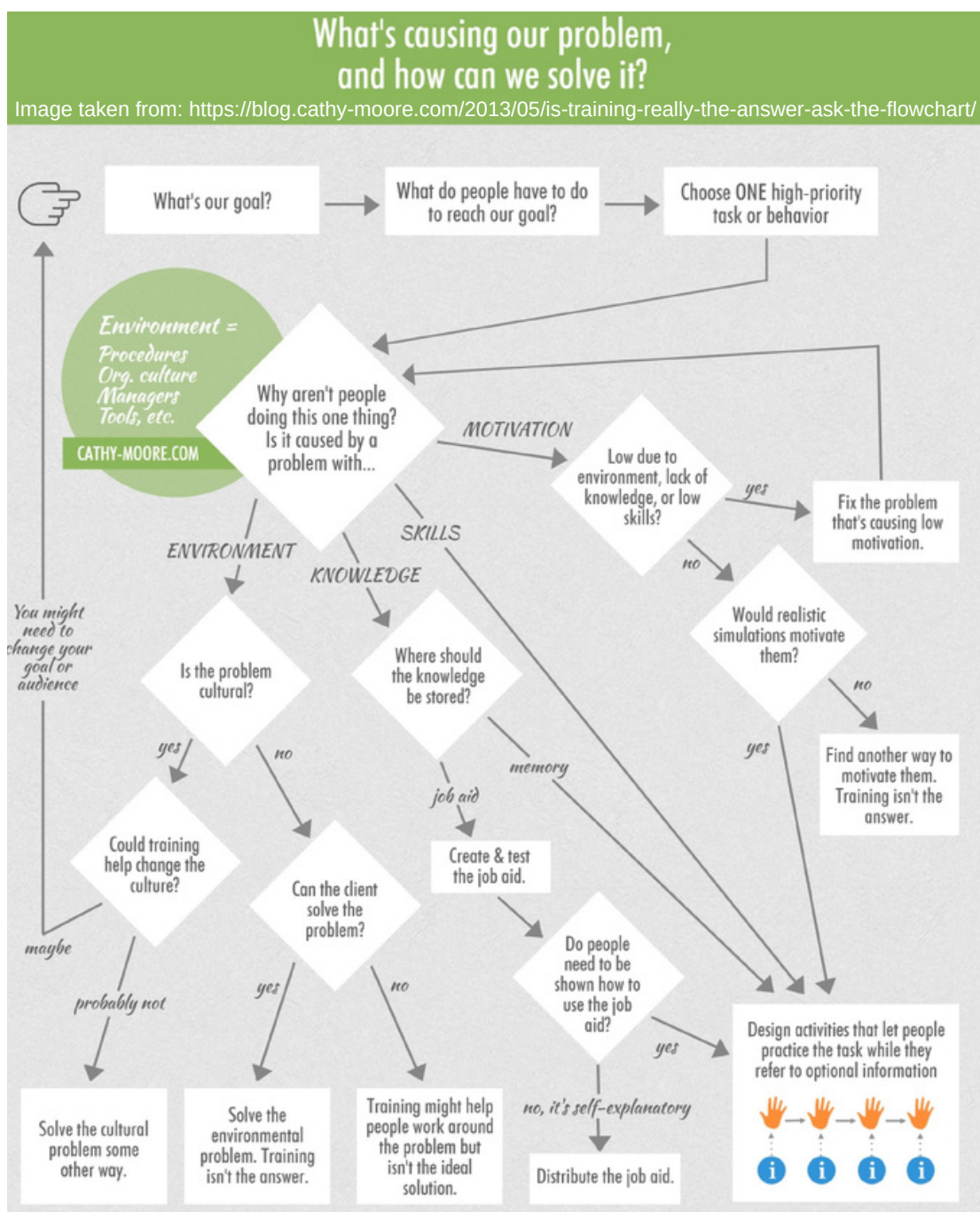
- Antoine de Saint-Exupéry



Consultant Resources

A compilation of resources to get you on your way!

Action mapping is your friend! A process created by Cathy Moore, action mapping helps analyze a performance problem and design solution that works. Will training help?



Consultant Resources

A compilation of resources to get you on your way!

Need help with developing learning outcomes? Here are some quick PDF files created by Dr. L. Dee Fink to help you get started.



What is significant learning?

https://www.wcu.edu/Webfiles/PDFs/facultycenter_SignificantLearning.pdf

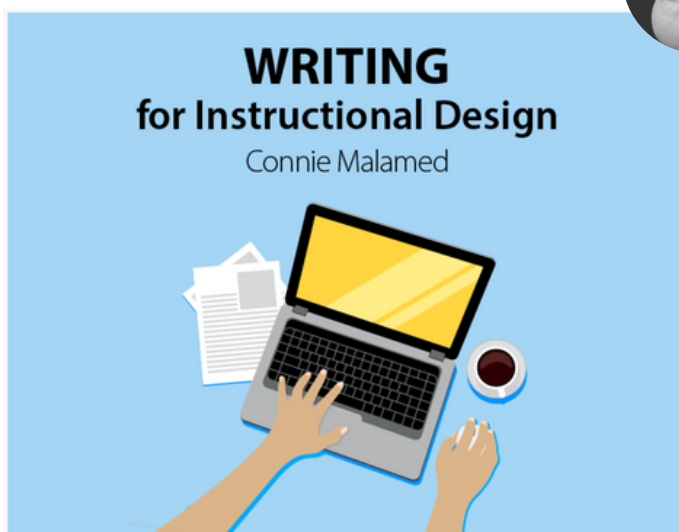
A Self-Directed Guide to Designing Courses for Significant Learning :

<https://www.bu.edu/sph/files/2011/06/selfdirected1.pdf>

Consultant Resources

A compilation of resources to get you on your way!

Struggling with how to write to engage your audience?
Review the following helpful resources for additional strategies to help you improve your writing process.



Writing for Instructional Design
<https://thelearningcoach.com/>



Writing to Engage Not Bore
Writing to Engage, Not Bore
(elblearning.com)



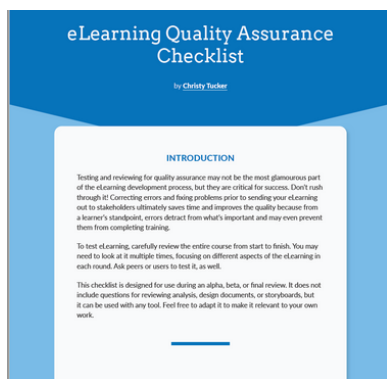
Check out a collection of free resources to use for your learning projects.

<https://thelearningcoach.com/resources/>

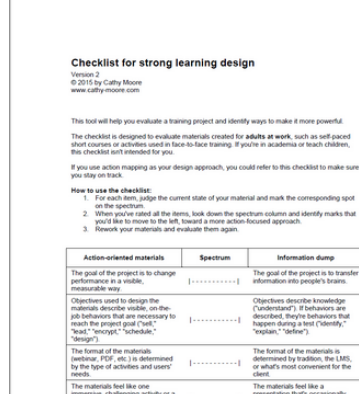
Consultant Resources

A compilation of resources to get you on your way!

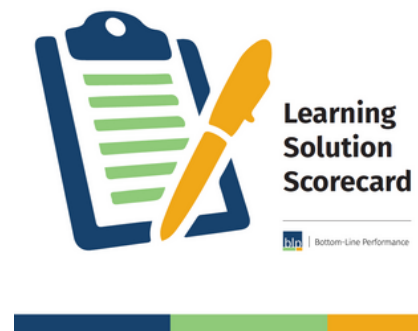
Curious whether your learning solution is relevant, engaging, and meaningful? Unsure of how to design and develop inclusive and accessible learning? Here are a few resources to support you in this journey.



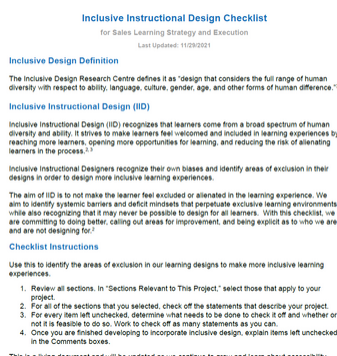
eLearning Quality Assurance Checklist



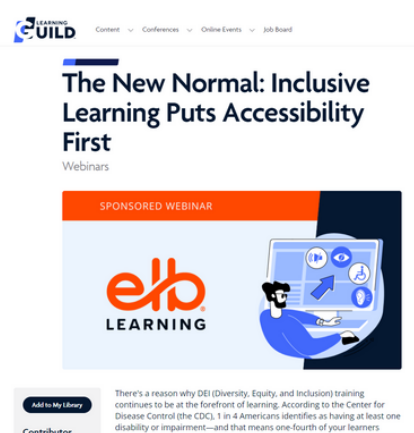
Checklist for Strong Learning Design



Learning Solutions Scorecard



Inclusive Design Checklist



**The New Normal:
Inclusive Learning
Puts Accessibility
First- Webinar**
<https://www.learningguild.com/sponsored/1694/the-new-normal-inclusive-learning-puts-accessibility-first/>

Internal Resources

Tools we use to help YOU learn and succeed!

- Subject matter experts, or SMEs, are trained in the use of the [NOA National Occupational Analysis](#) to analyze employee capabilities required for each position in an organization.
- The [TOWES Test of Workplace Essential Skills](#) administration and assessment analysis is a cognitive analysis used to determine skills and abilities before supervisory promotions and/or change of duties.
- [Skills for Success](#) provides Canadians with everyday skills needed for work, learning, and life.
- Training versus Performance: It Isn't Always a Training Issue: <https://trainingindustry.com/magazine/issue/training-versus-performance-it-isnt-always-a-training-issue/>
- The Importance of Training: <https://seismic.com/enablement-explainers/the-importance-of-training/>
- UFV Developing Learning Outcomes booklet (Bloom's Taxonomy): <https://www.ufv.ca/media/assets/teaching--learning-centre/forms/Developing-Learning-Outcomes-booklet.pdf>
- Fink's Taxonomy (see page 5 of employee handbook): <https://www.buffalo.edu/catt/develop/design/learning-outcomes/finks.html>
- Fink's Taxonomy Verb List: <https://intentionalcollegeteaching.org/wp-content/uploads/2021/05/fink-taxonomy-verb-list.pdf>
- Bloom's Digital Taxonomy Verbs: <https://www.neovation.com/learn/27-what-is-blooms-taxonomy-for-digital-learning>

Our Commitment to Continuous Learning

What We're Reading, Listening to, and Watching These Days

Don't get us wrong, we are guilty of binge-watching Netflix at times, but are very dedicated to our own learning and development to ensure we are equipped to meet the needs of our clients. Here's some resources that we recommend:

Helpful Websites & Folks we Follow:

- [The Learning Guild](#): Your one-stop for all learning and development related research, webinars, and resources
- [Top Tools for Learning](#): The annual list of the top 100 tools for learning compiled by Jane Hart
- [E-Learning Heroes](#): Join the Articulate Community of Practice to share your work, and learn from others
- [Dwayne Matthews O.C.T.](#): Head of School, Innovation & Partnerships, OVS/Keynote Speaker

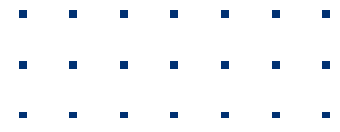


Books We're Reading, Podcasts We're Listening To

- Julie Dirksen - [Design for How People Learn](#)
- Peter Brown et al - [Make it Stick](#)
- Jane Bozarth - [Show Your Work](#)
- Simon Sinek - [Leaders Eat Last](#)
- Gregory Younging - [Elements of Indigenous Style](#)
- J. Kevin Ford - [Learning in Organizations](#)

Our Top 10 Recommended

Technology Apps for Clients and Employees!



Used By Us

Instructional Design



- Adobe Creative Suite: Illustrator, InDesign, After Effects, Premiere Pro
- Adobe Spark
- Blackboard Learn
- Canva
- DesireToLearn (D2L) Brightspace
- Articulate Storyline 360 & Rise
- Adobe Captivate
- Kaltura Capture
- SmartDraw
- edapp

For You

Education



- Zoom
- Google Drive
- YouTube
- SurveyMonkey
- Kahoot
- Canva
- Miro
- Padlet (for brainstorming)
- Grammarly
- Teams/Sharepoint

Remember:
**"Good Planning without good work is
nothing".**
- Dwight D. Eisenhower.

