

# The Basics

## What Is Social Media?

As I said in the “Key Terms” section of the Introduction, the term “social media” refers to online material produced by the public, distinct from content produced by professional writers, journalists, or generated by the industrial or mass media. Examples of social technologies used to create social media include those for communication (such as blogs), collaboration (such as wikis), communities (such as Facebook), reviews and opinions (such as Amazon reader reviews), and multimedia (such as YouTube).

The idea of social media is an outgrowth of the concept of “Web 2.0.” This is distinct from the early days of online material, which has come to be known as “Web 1.0.” Where Web 1.0 offered static web pages created by a few individuals, Web 2.0 technologies invite everyone to create and share content. Table 1.1 offers a comparison of Web 1.0 and Web 2.0.

Think back to your own experience using the Internet. Ten years ago, a person who wanted to create a simple web page with pictures, links, and video had to have some knowledge of programming and skill at working with graphics and multimedia, needed FTP software for uploading the files, and required access to a server to put them on.

Five years ago, a person who wanted to create a simple web page with pictures could create a blog and, upon logging in, had tools for adding things like pictures and links. That person then had to find ways to draw readers to the blog. Someone wanting to just share pictures needed a login and account for that (Flickr, Snapfish), then needed to notify

**Table 1.1. Comparison of Web 1.0 to Web 2.0**

<b>Web 1.0</b>	<b>Web 2.0</b>
Programmer-created web pages, graphics, Flash	User-created Web pages, pictures, user reviews, blogs, wikis, YouTube, social networks
Experts create content	Everyone creates content
Individuals visit web pages, read content	People construct shared information
Tightly controlled "sites"	Loosely controlled communities
One-way (one-to-many)	Many-to-many (and peer-to-peer)
Britannica Online	Wikipedia
Publish	Participate
Firewalls, hierarchies	Dynamic, non-hierarchical
Static, stable content, few changes	Constantly updated content (Twitter, Wikipedia)

others that pictures were there; someone wanting to share video needed a YouTube account and login. Typically, each tool employed had its own site, separate login, and often a separate learning curve for the user.

Nowadays (assuming you have at least seen Facebook), consider what is available to even the minimally skilled computer user: a one-login place that aggregates all the features of the other sites. You set up one account, log in once, and can post thoughts, participate in discussions, and share pictures, videos, and links. It is truly different, much more democratic, and decidedly more empowering than the "old days" of Web 1.0.

So, if nothing else, try to look at the tools for their ability to empower individuals. They allow for ease in creating and sharing content, support conversation and collaboration, help to connect people in disparate roles, and reduce barriers of time and geography. The Afterword in this book offers my thoughts on the bigger implications of effective use of social media in organization-wide initiatives, such as managing

knowledge, preserving institutional memory, creating transparency, and enhancing communication. For now, let's examine how social media can be of particular use to training practitioners as they enact their work.

## Why Social Media in Training?

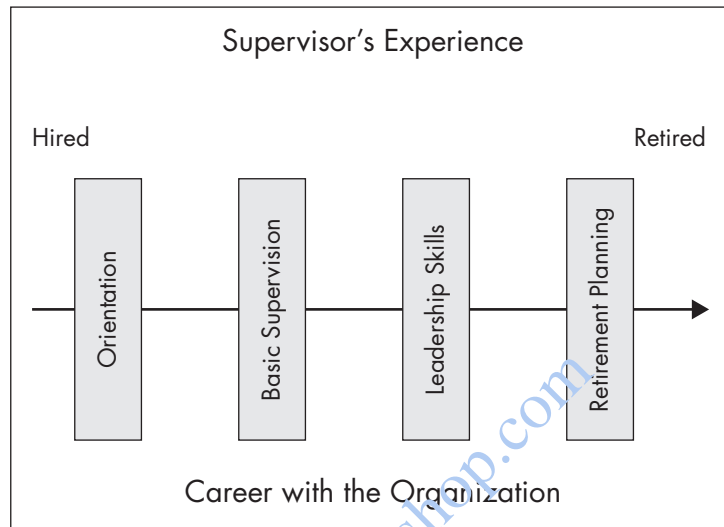
The effective use of social media strategies to supplement, or use in place of, traditional training endeavors can provide a big payoff for both learners and trainers. For one, the technologies dissolve many of the barriers between the learners and the instructor, creating a more informal, collegial, and interactive learning environment.

Trainers and learners frustrated with elements of the traditional approach will find some relief through using social media. It can provide a vehicle for continuing conversations beyond the time constraints of the workshop schedule. It can extend the learning process beyond the confines of the classroom space and support development of communities of learners. It's important to realize that, even if (as a trainer) you do not find traditional instruction frustrating, many of your learners—as noted in the Introduction—have made their interest in and acceptance of online interaction clear. Again, social media tools can help the trainer meet learners where they are.

Training strategies incorporating social media tools can help learners become more aware of their own learning process, more mindful of and deliberate about their own learning, and encourage them to take ownership of learning and then apply it to their jobs. Perhaps most importantly, effective use of social media in training can provide additional support for sustaining new learning and transferring formal training back to the workplace; this is essentially the focus of the book, and you will see many examples as you go through the individual chapters. And finally, thoughtful use of social media in training can provide additional support for, and room to include, the training department in the informal learning so critical to job success.

The traditional model of workplace training and development tends to look much like Figure 1.1. In the span of a twenty-year career with a company, this supervisor attended a two-day new hire orientation

**Figure 1.1. Typical Formal Training Events Throughout a Career**

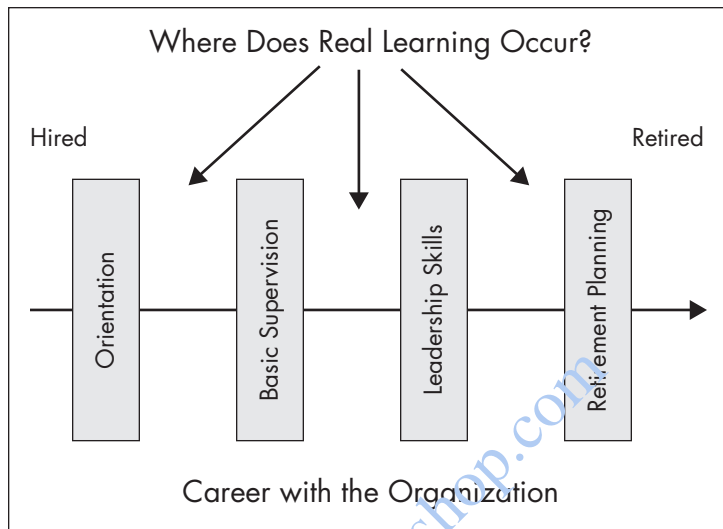


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program, a six-module supervisory skills course, a leadership development program, and finally a retirement planning seminar. Along the way there likely were other training events, such as compliance updates, training in new processes or procedures, and workshops on using new software or equipment. But the vast bulk of this worker's time was spent on the job, not in a structured training event.

Consider our supervisor in the example shown in Figure 1.2 instead. She is spending many, many more hours engaged in informal learning activities (although she may not always recognize these as "learning"): coaching from the next-level manager, meetings with a chosen or assigned mentor, and casual conversations in the hallway or at the water cooler. She is learning via the "Hey, Joe!" phenomenon: "Hey, Joe! How do I reformat these tables again?" "Hey, Joe! What did you say was the trick to getting these contracts through so quickly?" She is reading, viewing online tutorials, and, yes, learning by trial and error. Research (Dobbs, 2000; Kupritz, 2002) indicates that as much as 70 percent of workplace learning is informal, occurring outside the classroom and in

**Figure 1.2. Most Learning Occurs in the Spaces Between Formal Training Events**



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the spaces between formal training events. Social media is one way for the training department and the training practitioners to get into those spaces and reach employees between events. In essence, training approaches incorporating social media strategies more closely resembles how we really learn in our day-to-day activities.

## Which One?

At present there are literally dozens of social media tools available. Experience has shown that, over time, products tend to consolidate as a few clear “winners” emerge. The tools I have chosen to cover in-depth in this book are the ones most popular at the time of this writing and the ones that seem most likely to be around for a few years. But they were also chosen for their distinct differences: microblogging (Twitter), blogging, community (Facebook), and collaborative editing (wikis). Other products replicate or combine these functions. Whatever you choose to use—and whatever future products bring—it is critical that you experiment and learn to see technologies for what they really are.

Blogging tools, for instance, really provide very easy means of creating clean, simple, professional-looking web pages. We'll be going through the tools one at a time, from Twitter to Facebook, then to blogs and wikis, and then look at some add-ons like YouTube and SlideShare. Understanding the technologies at their roots will help you make good choices and adapt ideas in this book to whatever new tools you may encounter in the future.

In choosing the technologies to use, remember that every additional site to check, every different user ID and password to remember, every new interface to learn, creates another obstacle for the learner. Try to meet your learners where they are and take them where your organization wants to go. For instance, Facebook and LinkedIn allow users to create group pages with discussions. Because so many people are on Facebook and tend to check in often, it's the product discussed in this book. But, depending on your learners, you may want to explore adapting the ideas here for the similar structure of LinkedIn. Consultants and sales reps may have the need to accumulate many business contacts and identify future prospects. They may all have LinkedIn accounts and may choose to log in there every day to make new contacts and check in with groups. In that case, you might choose to utilize LinkedIn with your workforce. Your organization may be using the at-cost MS SharePoint product; it contains many of the same blog and wiki features that the "outside the firewall" applications discussed in this book share. Try to identify the tools your organization's employees are already using or those that are likely to meet their real needs.

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According to Deloitte data, 47 percent of Baby Boomers maintain a profile on a social site. Of those, 73 percent are Facebook users, while 13 percent use LinkedIn.

Deloitte, *State of the Media Democracy* (4th ed.), 2009.

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## Choosing What to Use When

Think of the different technologies as "tools," for that's what they really are, and choose the one that suits your instructional goals. Facebook is a hammer, a wikis is a saw, and each is suited to different overarching

goals. It is tempting—and I am often asked—to offer one answer for a given situation. (As in, “If you want to have a community, then use Facebook. If you want to do collaborative work, use a wiki.”) It just isn’t that simple. Many different tools can support a community: It may surprise you to hear that my own “best” community, for my own development, exists among my Twitter contacts. Most tools will allow you to have discussions or do collaborative work. You’ll need to choose things that support your instructional goals, but also those that your organization will allow (perhaps Facebook instead of MySpace, or an inside-firewall microblogging tool instead of Twitter), what your organization already has in place (perhaps a company Facebook page or blog) and what your users are already using and/or will accept. You also need to choose tools that you are comfortable using and will work to support: as you’ll see in Chapter 4, a blog may not be the best choice for the trainer who doesn’t like to write.

It’s tempting, too, to become “tool happy”: “I’ll use a blog, but we’ll add on some Twitter activities, and link back to a wiki.” Think through what you are trying to accomplish, identify tools that will help you get there, and stick with your instructional plan. Also try not to change horses mid-stream: If the blog isn’t working as you’d hoped, don’t ask learners to suddenly switch to a wiki. Talk with them about how to make the blog work for the group. Be flexible, but also be mindful of demands on your learners—you want to support learning, not create confusion.

In this book I try to help you choose the tool or tools you need. They are all the means to an end (better transfer of learning, more engagement in the learning process, growth of a learning community, support for informal learning), but they are not ends in themselves. The point is not to “do” Twitter any more than it is to “do” e-learning. Always consider: “What do my learners need? How can I help them find it?” And stay alert—as tools change, evolve, and come and go—to new possibilities.

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The issue is not the technological widget but the means by which interaction around the technology is enabled.

*Phillip D. Long, Centre for Educational Innovation and Technology–  
Brisbane; comment on Twitter October 20, 2009, as @RadHertz.*

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## Getting Started

### It's Mostly About Facilitation, and You Already Know How to Do That

Before you begin, particularly if you find this all somewhat daunting, consider this: You are already, more or less, doing this. As a trainer, you already possess skills critical to facilitating and guiding discussion, drawing out quieter participants and managing louder ones, and recapping conversations. You know how to facilitate a role play or respond to a challenging participant. You have a repertoire to bring to bear on activities, even if you are guiding them in a new environment. You will find that your past experience serves you well in supporting and facilitating interactions with social media tools.

### Extending the Training Experience

It is important in using social media that you move learners toward working together, toward building community, not just posting an answer in response to you. Encourage dialogue, debate, and interaction. It is possible to be collegial and personal without revealing private details. For instance, asking people to post a photo of a pet, a link to the website of their alma mater, or a golf course they'd like to play helps to build connections and identify similar interests without invading privacy.

### Providing Practice Opportunities

Most of the social media technologies described in this book are easy to use in a discuss-this, answer-that format. That's fine, if the questions invite real reflection, thought, reasoning behind ideas, and application of judgment in using critical skills. But learners on a shop floor need to actually use the forklift. Other workers need to use their computers. They need to analyze the data. Or they need to manage people, make cold sales calls, or build a team. Be sure that your approaches include real opportunities for practice. As described in the individual chapters, "practice" can take many forms.

## Supporting the Learners

Nothing else you do—lesson planning, careful design, thoughtful choice of technologies—will matter if your learners struggle through the training. Take steps to make the experience painless and positive for them:

- Make the social media site(s) easy to find. Put your Twitter handle, blog URL, or Facebook name on handouts, your organization's website, and in your email signature.
- Provide ample instruction in setting up accounts and using the tools. The products described in this book all offer easy setup guides, and most offer good tutorials. YouTube is also a good resource for information on using different products. Remember that some learners will just need a "quick start" overview; others will need more in-depth help.
- Encourage collaboration; do not force friendships. You can, for example, set up a Facebook group or fan page and invite your learners to join you there. They do not have to become your Facebook "friends" or set up "friend" relationships with other class members. They can access the group or site and participate without everyone else being privy to what is on their own personal pages.
- On the one hand, provide clear guidelines and deadlines. For instance, if you are asking learners to read and respond to one another's blog posts, then the authors will need to have their posts up by a certain date so the others have time to read them. If learners are engaging in a collaborative project, then ask them to be sure to check in regularly (and define "regularly." Do you mean once a day or twice a week?).
- On the other hand, don't micromanage. While providing clear guidelines and deadlines is necessary, organizations and their trainers seem overly concerned with learners who may post inappropriate or critical comments. Some instructors feel the need to over-control and direct conversation toward some desired end, and this sometimes can appear manipulative. Worse, too many rules can discourage participation. Take a look at Figure 1.3, an organization's guidelines for participating in the employee discussion forum. Can you see why hardly anyone does?

**Figure 1.3. Too Many Rules Discourage Participation**

<b>Rules for Posting</b>	
Do's	Don'ts
Keep it respectful.	Don't use any speech that is inaccurate, unlawful, harmful, defamatory, vulgar, obscene, profane, hateful, racially or ethnically objectionable, personal attacks, antagonistic, threatening, abusive, or harassing to other users or the general public.
Share information that is helpful and public.	Don't post proprietary information, trade secrets, or confidential information.
Keep it relevant.	Don't post advertisements, solicitations, chain letters pyramid schemes, investment opportunities, or other unsolicited commercial communication.
Use it wisely.	Don't spam.
Use a descriptive title for your post.	Don't insinuate or suggest that any statements made by you are endorsed by us.
Read other responses before you post.	Don't post personal ads.
Further the discussion.	Don't use UPPERCASE. This is the same as shouting.
Relate personal experiences.	Don't give out personal information.
Ask for clarification.	Don't use vague subjects lines like "?", etc.
Put yourself in the customer's shoes.	Don't repeat information already provided.
Get to the point.	Don't excessively quote previous messages.
Be positive.	Don't get off topic.
Be understanding.	Don't make assumptions.
Know when to back off.	Don't dole out truisms. (You get what you pay for.)
Focus on your area of expertise.	Don't overwhelm with information.
Make correct spelling and grammar a priority.	Don't trash products, ideas, or people.

## Finally: Walk the Talk

In order to be effective at using social media, you have to start participating in social networking activities and develop fluency with the tools. If nothing else, set up Facebook, Twitter, and LinkedIn accounts. Use them as you follow along with this book. Find some blogs to read (search “google blog finder” for topics like training, e-learning, or adult learning). You won’t learn about Twitter by having someone “explain” Twitter. You need to join and participate in order to learn how to use it as an effective training tool. Likewise, take a stab at trying out the many features available in Facebook. Find and link to a video clip. Upload some photos. Start a work-related discussion among like-minded colleagues. Work toward the goal of becoming, in the early 21st century, the “Networked Trainer” (Figure 1.4).

**Figure 1.4. The Networked Trainer**



Image adapted from original with permission of Alec Couros and Silvia Rosenthal Tolisano.

## Summary

The trainer using social media thoughtfully will find it a wonderful new means of engaging learners, extending the learning experience, and supporting transfer of new learning to the workplace. Effective strategies can additionally extend the reach of the trainer and the training function, positioning training not just as an event, but as part of the learners' daily lives. In reading through the chapters addressing different technologies and activities, keep on simmer in the back of your mind the topics you teach, the strategies you already use, and the way activities would fit into your particular content and style.

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