

LEARNING LEADERS •FIELDBOOK•

Lessons from the Field:

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Learning Leader Fieldbook

Senior learning leaders live a precarious life these days. As a result of our tumultuous global economy, we're witnessing massive change in the world of business and within learning organizations. The role that learning plays within the larger context of business is evolving too.

Amidst all this change, one thing is certain: today's world of learning is not the one we knew even a short time ago. Many learning efforts have been streamlined and in some organizations, key learning positions have been eliminated. Although there are some situations where the role of learning is expanding, there is far more contraction underway.

Today's learning leaders face more challenges than ever before. How do they deal with the economic and business climate we are all facing? How should they make decisions? How should they effectively interface with business leaders? How can they build (or re-build) a team for success? All of these questions have become even more critical and challenging.

The Learning Leader Fieldbook is designed to bring you insight into the worlds and daily realities of a prestigious group of learning leaders. We've captured their thoughts and some guiding principles and actions that they believe have aided their success.

As we worked to bring this group together and compile their thoughts, ideas and viewpoints, there was one common thread that I began to see: the passion that each of them brings into the world of learning on a daily basis. But it goes deeper than that: it is a passion for the potential impact of effective learning on the outcome of business. Can passion make a difference? I think so, and I think it is a difference that each of these learning leaders brings to the table every day.

It's not always easy to be the champion of learning and execute strategies effectively. Things don't always turn out as planned; however, after working with this fine group over the past year, I do know that if you are looking to tap into the minds of some of today's most experienced and effective learning leaders, you've come to the right place.

We hope you enjoy the opportunity to get into the minds of these learning leaders and look forward to your feedback on The Learning Leader Fieldbook. I believe you'll find that learning from these leaders' successes and mistakes will prove invaluable as you continue your own learning career.

There is one final thought that I'd like to share. Throughout the Fieldbook, you'll see us use the term Chief Learning Officer (or CLO) when we refer to a senior learning leader. Many people continue to ask the question, "What is a CLO?" I'm sure that this debate will continue, and I'm also sure that once you read and listen to this body of work, you'll have a good idea of why these are some of the most successful and highly regarded CLOs/learning leaders today.

Bill Byron Concevitch
June 2009



Bill Byron Concevitch

Bill Byron Concevitch edited this work while he was serving as a MASIE Learning Fellow. He currently leads global sales learning and development for the Personal System Group division of Hewlett Packard (HP). In this role, he leads a global team of performance consultants who work with sales leaders to develop solutions that drive immediate sales revenue and long-term market share. Previously, Mr. Concevitch spent time both in leadership/skill development (Dale Carnegie, ExecuTrain and LearningTree) and in technology and content development (Element K, Mentergy, KnowledgePool) as a vendor/supplier. He's helped build more traditional classroom-based providers of learning as well as technology-focused tools and offerings. On the corporate side and in his role as a Chief Learning Officer, Mr. Concevitch became the CLO of ExecuTrain in 1998 and later served as the Chief Talent + Learning Officer of Witness Systems/Verint, a global provider of Workforce Optimization Solutions. He is a true believer in the impact learning can have on business results and is highly focused on making this a reality wherever he goes.

[Click here for an Introductory PodCast from Bill Byron Concevitch](http://learningwiki.editme.com/clopodcastconcevitch)
<http://learningwiki.editme.com/clopodcastconcevitch>

TO: Global Learning Colleagues

FROM: Elliott Masie, The MASIE Center

Learning Leadership is a mixture of skill, experience, experimentation, tone and commitment.

In these UnCertain Times, Learning Leadership is incredibly important to the survival and evolution of our organizations and workforces.

The MASIE Center is pleased to present the Learning Leaders Fieldbook as a free, open-source resource for and by learning leaders from around the globe.

We hope that you will read the stories from your Learning Leader colleagues, listen to their PodCasts and share this resource with other learning professionals.

Special thanks to Bill Byron Concevitch for compiling content from some of the best and brightest leaders in the Learning field. And, a warm thank you to those leaders for taking time out of their hectic schedules to contribute their own experience and perspectives to this Fieldbook.

Finally, I would like to appreciate members of The MASIE Center team that worked on this project: Brooke Thomas-Record, Editor; Lauren Boughton, Multimedia Designer; Lara Smith, PodCast & Wiki Coordinator.

If you have any feedback on this e-Book, please send it to brooke@masie.com



Yours in learning,

The MASIE Center's Learning CONSORTIUM

Chapter 1: Positioning the CLO

By Joy Hunter - CLO, Dept. of Veterans Affairs

Positioning yourself as CLO is far more than establishing your place in the executive organizational chart. If your name and title in the appropriately placed box is your visible and primary focus, it communicates to others that you are expecting “entitlement” by position. Never doubt that a seat at the leadership table is earned over time by practicing progressive leadership, bringing added value to the executive leadership team and demonstrating that you can deliver results. Successfully positioning yourself in the organization is a process of deliberate and systematic strategies.

- Target not only the most senior formal leadership table, but also the multiple formal and informal leadership tables that exist across as well as up and down the organization.
- If training is decentralized within your organization, consider establishing a learning governance model as an effective strategy to navigate multiple learning programs, departments and players. Governance can help establish and define relationships that build trust, create opportunities for collaboration and facilitate resource leveraging. The executive steering committee should be chaired by the corporate CEO or COO, if possible.
- As CLO, your presence at any leadership table must demonstrate that your leadership skills and contributions go beyond your core knowledge as CLO. It is understood and expected that you bring training expertise to the table, but what else do you bring? Do you know the pulse of the organization so as to demonstrate systems thinking and organizational stewardship? Are you the “go to” executive for leading special assignments that are perceived and recognized as outside the traditional learning leader domain?
- In the federal sector, all senior executives must demonstrate five core capabilities/qualifications: leading change, leading people, driving results, possessing business acumen and building coalitions/communications. CLOs in both public and private sectors must demonstrate each of those to attain and sustain a seat at the most senior of leadership tables.
- Your technical expertise should be transparent at this level. “Edu-speak” is not the language or currency in this circle of leaders.
- Establish “circles of influence”. Your personal development plan should include 4-6 peers or higher-level executives with whom you want to develop or improve your relationships. These can be key thought leaders or individuals with specific knowledge or expertise to help advance your vision for a learning organization. They are individuals who become part of your ever-expanding network: they bring dynamic diversity to your organizational awareness; serve as valuable resources and sounding boards for problem solving; and are effective members of your own learning leadership table. These are the individuals who share and understand the value of a learning organization and will ensure that your “voice” is heard, even when you are not physically at the table. Periodically update and expand your circles of influence.
- Make the development of other learning leaders in your organization a priority. For a large organization with hundreds of sites of operation, an effective learning organization ultimately depends upon local leadership, which determines the local learning culture. Your front line learning officers need to be learning leaders in their own right. Like you, they must demonstrate leadership skills within their own domain. The combined impact of effective learning leaders at multiple organizational levels only strengthens your own base as CLO and amplifies opportunities for significant organizational impact.

While leadership core competencies are constant, you must be aware of which ones are in highest demand at any point in time. The CEO's personal leadership style as well as the organization's performance and priorities will drive which competencies are most valued. They will certainly shift over time, so first, you must continually demonstrate your awareness of those critical skills and ensure that the leadership curriculum reflects current and emerging priorities. Second, you must walk the talk in your own leadership practice. For example, one of the most opportune ways for CLOs to distinguish themselves from their peers is by demonstrating business acumen. Your ability to understand the "business of education" with the same level of accountability for resource management and bottom line impact that your executive peers demonstrate will firmly establish your reputation and position within the executive ranks.

Practice progressive leadership by anticipating and positioning to address organizational needs. The effective CLO leads a learning organization that has the agility to deliver high quality and effective learning solutions.

Beyond mastering and demonstrating the expected level of executive competencies at this most senior level, ultimately, the most important impact you make is the legacy of leadership you create. This is not comprised of platitudes that come as you pass the baton, but rather the daily impact you make by the core values you consistently demonstrate: integrity, respect, commitment and trust. During your tenure as CLO, other leaders will seek you out and high potential employees will want to work for you. Over time, you will have elevated the CLO position to a new level of credibility and built a dynamic, high-performing team that can be sustain itself and continue to grow beyond your departure.



Joy Hunter - CLO, Dept. of Veterans Affairs

Joy Hunter was appointed Dean, Department of Veterans Affairs VA Learning University (VALU) and Veterans Health Administration (VHA) Chief Learning Officer in August 2003. The VA Learning University serves as a catalyst for Department-wide learning initiatives and strategies that support VA's ability to create and maintain a high-performing workforce to serve our nation's veterans. As Dean, Ms. Hunter facilitates the use of emerging technologies and leverages resources and partnerships with other agencies, colleges and universities to maximize economies of scale and ensure all-employee access to learning opportunities. In addition to her role as the VALU Dean, Ms. Hunter serves as Chief Learning Officer for the VHA's Employee Education System, and directs educational services that support the workforce development and continuing education needs for 250,000 VHA employees.

[Click here for Joy Hunter's PodCast](http://learningwiki.editme.com/clopodcasthunter)
<http://learningwiki.editme.com/clopodcasthunter>

Chapter 2: Core Principles to Guide the Actions of a CLO

By Holly Huntley, Global Chief Learning Officer, CSC

Holly Huntley's Top 10

1. Make other people successful: be a trusted advisor.
2. Have a point of view: thought leadership is everything.
3. Don't get seduced by the "goodness" of learning (and avoid learning jargon).
4. Recognize that learning is a social construct; be a connector of talent.
5. One size does not fit all, so provide performance support tools.
6. Be at the center of the change agenda: understand how your corporate culture impacts performance.
7. Model the way for others (eat your own dog food).
8. Brand from the inside out (this is the age of talent after all).
9. Guide executives to become good sponsors (if you don't have real sponsorship don't bother).
10. Align learning programs with strategic roles: invest where it counts the most.

1. Make other people successful.

CLOs have to be relentless about studying what enhances the performance and productivity of others. After all, it is not about you! I have seen far too many CLOs get derailed by letting their own egos get in the way.

I believe the number one priority for any CLO is to stay genuinely focused on the mission of helping others to succeed. Stay true to this mission and you will deliver results for your organization.

To have the most organizational impact, start at the top to improve leadership effectiveness. All leaders need trusted advisors. The most successful leaders know this and will rely on a core group of trusted advisors to make decisions and get feedback. As CLO, if you can play this role, it will go a long way in positioning you to understand the core needs of the business. If the trust is there, leaders will come to you to as a problem solver. This is an ideal scenario for the CLO. Otherwise, you may find yourself peddling programs or, worse yet, doing speculative training.

If you are not able to play this role, you can help to connect leaders with the right advisors.

As CLO, you need trusted advisors as well. Who advises you on your leadership style? Who helps you to keep pace with trends? Who helps you stay connected with the needs and challenges of the workforce? Who do you look to provide perspective? Who do you bounce ideas and decisions off of? Surround yourself with good people and know when to listen (especially to your critics - they will provide the richest source of opportunity for course correction). Being an effective CLO means being a good leader and knowing when to course correct along the way.

Which functional experts do you align yourself with? It used to be that learning practitioners only worried about getting alignment with the CFO. These days, alignment with the entire C-Suite is needed to help carry out the charter of learning and talent development. Understanding the mission and vision of your CIO and CTO is mission-critical to harnessing the latest technology. In my case, I also have a Chief Innovation Officer who serves as an excellent business partner. Figure out which strategic partners you need internally and nurture those relationships.

2. Have a point of view.

As CLO, the organization looks to your thought leadership, which means you need to have a clear point of view on an array of subjects. And, your ability to do environmental scanning is critical: understand the business, know the competition, track trends and benchmark externally. Your point of view has to be dynamic. You need to continuously evolve your thinking to keep pace.

In order to propel the organization forward, it is important to understand its history. Particularly if you are new to an organization, take time to study and appreciate the past in order to inform the future. You need to have a full appreciation of where the organization has come from. What are the roots of the company? How do those roots shape the organization's DNA? What types of leaders have been successful and how have they been rewarded? What is the risk tolerance of the organization? Understanding past successes and failures can help you gain credibility and trust with tenured employees. It can also help you gauge organizational readiness for new programs and initiatives.

3. Don't get seduced by the "goodness" of learning.

Let's face it: a lot of us in the learning field are academics at heart. We love theory, conceptual models and frameworks, and are entertained with new ways of looking at old problems. It is very easy to get lost in the functionality of a slick new tool or an abstract "meta model" and lose touch with the learner. Trust me (I speak from experience). Most of us in this field need to be reminded to come down to earth every now and then. If you want a "sure fire" way to over-engineer a solution, gather all of your best and brightest learning practitioners and lock them in room to architect the perfect total solution. Don't be surprised if what they come up with requires a translator to explain it to the average user. Worse yet, it might be too difficult to deploy or maintain, so it lives a short shelf life. The bottom line is that you can develop an award-winning instructional design masterpiece and miss the mark with your target audience.

Part of the trap is getting seduced by the allure of the "subject matter expert" (SME). The SME approach to courseware development is now giving way to new technologies that harness collective intelligence and make it possible to design programs by co-creating them directly with learners. Using these technologies, we can tap into "The Wisdom of the Crowds" (as described in the best selling book by James Surowiecki) and get input directly from learners on what and how they want to learn. By giving them the opportunity to develop their own scenarios and case studies, we can reduce development cycle time and ensure relevancy to participants.

Measurement is important, but resist the temptation to measure everything. There is a cost for conducting level 4 and ROI studies, so be selective in determining which programs need the most sophisticated levels of measurement. Also, behavior change is difficult to correlate solely with training as there are many different variables at play. I recall investing in a 3-year longitudinal study of management behaviors. It was very difficult to prove that behavior changed as a result of the training alone. You might recall the Hawthorne Effect, where employee behaviors changed simply by paying more attention to the working conditions of the workforce. Sometimes as the CLO, you have to have the courage to do the right thing even if you cannot produce scientifically significant results. Sometimes you have to ask your executive sponsors to simply trust the process.

Avoid jargon. I admit that I love the language of learning and words dreamed up by OD consultants, but this buzzword bingo can be deadly with your peers in the C-Suite. There is a difference between offering thought leadership and spouting off about the latest business trends. If you need to use the language of learning, use it within your functional community but not with executive sponsors or employees.

4. Recognize that learning is a social construct.

In studies that CSC has conducted with our “A players,” we found that an individual’s ability to network both internally and externally is the number one factor cited for success. Additionally, how often have you heard learners tell you that the best part about a class they attended was the networking?

Thank goodness technology is now evolving so that social networking can easily be incorporated into learning design. The advancement in social networking has closed the gap between traditional classroom training and virtual learning. We have come a long way from the page-turning CBTs developed in the early 90s. In those days, we sold the virtues of the CBT method as “self-paced.” Today, you can still set your own pace but you don’t have to go it alone. Virtual experts, mentors and collaborators across the globe can complement any learning experience with specific, personalized and just-in-time information.

At CSC, we are changing our approach to talent management to incorporate social networking. Through a new integrated suite of talent management tools, employees will be able to identify and select contributors from their network to give them performance feedback or career development guidance. This is a shift away from the traditional top-down approach to feedback, where the supervisor or manager “knows best” and allows employees to get a balanced perspective across multiple view points.

As CLO, you can play a role in helping to strategically connect talent. Play the role of talent matchmaker across organizational boundaries in order to help employees broaden and grow their careers. There can be huge payoff in ensuring that learning and development professionals are also plugged into the succession planning process. At CSC, my function oversees both processes, allowing us to integrate development strategies into succession planning.

5. One size does not fit all.

Learning is personal. Very personal.

For generations, we have grown up learning to sit obediently as the teacher or instructor follows a carefully structured lesson plan. In this classic learning environment, there is no escape if you already know the material, want to explore a different angle or have no interest in the topic. Today’s “digital natives” will have a very different experience as they expect access to information on demand.

CLOs can broaden their impact on an organization by providing performance support tools. Look beyond traditional learning and development programs and understand which tools will improve productivity, speed and knowledge transfer. What tools can you invest in to provide on-demand access? Embed these tools into the existing workflow for employees to apply to specific job tasks. This brings new meaning to the term “on-the-job training” and can transform the training function. No longer is training viewed as a separate event that requires approval to travel, justification of lost opportunity costs, etc. When employees are provided with performance support tools that complement their work, their behavior changes dramatically. So might the programs you need to address via formal training. A performance support strategy can free you up to be more selective about which training programs you need to deliver face to face.

Five years ago, with over 90,000 knowledge workers, CSC decided to invest in a digital books collection for the global workforce to keep employees current in business, IT, engineering, finance, etc. It dramatically changed how people thought about learning as this just-in-time access to information improved their ability to deliver on projects efficiently. Most importantly, it created an

appreciation for informal learning. Today, we are embedding these tools into our communities of practice and throughout our enterprise portal to ensure they can be accessed dynamically by employees.

6. Understand how corporate culture impacts performance.

Sit at the center of the change agenda. CLOs should understand the business strategy and how corporate culture needs to evolve to directly support organizational growth. What skills and competencies will be most important to delivering on your strategy?

We interviewed and assessed our CSC executive team to pinpoint specific competencies that leaders would need to support our 5-year enterprise growth strategy. We distilled the input into a success profile for leaders, which is used in courseware design, tailoring 360 feedback, development planning and executive coaching to help reinforce new leadership skills that will transform how we operate and deliver services to clients. The success profile can be embedded in all talent management processes to include recruitment, recognition/rewards, etc.

Leaders play the biggest role in shaping culture; however, you also need to understand the working conditions of your workforce in order to inform your learning strategy.

Consider how your management structure impacts performance. For example, if you have a global, matrixed organization but a command and control approach to management, you can have significant misalignment. You can build new leadership skills to align with your operating model. Helping leaders build skills to lead virtual teams can be a very important shift for most globally-dispersed organizations today.

I believe that, in most companies, the approach to management and leadership has not caught up with the way work is performed and distributed in the digital economy. What are the norms and policies regarding time charging? Do employees have time to innovate and learn? Is risk taking encouraged? My favorite example is Google's approach in which engineers are allowed to use 20% of their time for pet projects to encourage innovation. Which internal policies and processes can you influence to improve your organization's learning culture?

7. Model the way for others.

If role modeling is one of the most powerful forms of learning, what kind of role model are you? Does your learning function model the way for others? I have always been a big believer that the Learning & Development function must eat its own cooking.

If you run your performance management process, do you follow it? Does it add value? Test drive everything yourself to ensure it adds value from a user perspective. Challenge your team to do the same.

Gandhi's quote, "Be the change you wish to see", is perhaps the most relevant reminder for leaders. As CLO, you must work to exemplify the leadership behaviors you seek to develop in others. I have evolved my own style along the way to reflect organizational needs and change in executive leadership. Be self-aware. Share your learning experiences in a transparent way for others to learn from and to signal that leaders never stop learning.

8. Brand from the inside out.

Tom Peters said it best in the book *ReImagine*: “Talent = Brand. Brand = Talent.” As he adeptly points out, we are living in the age of talent. Do your employees serve as ambassadors for your brand? Do your training programs align with your brand?

Partner with your Chief Marketing Officer to understand and align with your brand strategy. The best global brands get this connection and brand from the inside out by training employees to behave consistently with the image portrayed to the marketplace. Think of this process as holding a mirror up to the organization. How well do we live our brand? Are employees trained to understand it so that they execute tasks and make decisions that are consistent with it? Do your corporate values support the brand?

Do employees communicate in a manner congruent with the brand? How does storytelling play a role in your organization? The CLO’s organization can help with internal brand alignment through communications training, value-based leadership programs and recognition programs that reward key behaviors.

The brand identity of the Learning & Development function can be equally important. At CSC, we have a brand identity for each core offering and develop a communications plan for each. We have a principle to communicate 7 times, 7 ways as a reinforcement strategy. Rinse and repeat.

9. Guide executives to become good sponsors.

How often have you looked back on a failed project only to discover you did not have strong executive sponsorship? You have probably learned that if you don’t have solid sponsorship, don’t bother. At CSC, we train our leaders to be good sponsors. Good sponsorship is more than just providing lip service or approving funding. You can define and contract with your sponsors to model and reinforce key behaviors associated with your learning or change program. You should also get leaders involved as much as possible in training programs as teachers and mentors.

Transparency is one of the more powerful leadership skills that I have seen modeled. When an executive stands up and openly shares his or her own 360 feedback results with the team, the impact can be transformational as it sets the tone for candor. Use the 360 process with intact leadership teams as a way for them to examine their collective organizational impact as leaders. This practice can pave the way for peer coaching, better conflict resolution skills and collaboration within the team.

For succession planning, I also advocate using a process with the leadership team to foster open and candid dialogue to discuss the next generation of leaders’ readiness. We asked our executive team to collectively own responsibility for developing the slate of succession candidates. Traditional succession planning is more siloed and asks each leader to concentrate solely on his or her own replacement and org chart. When you ask the executive team to collectively own responsibility for the talent pool, you foster an environment that will contribute to more collaborative approaches. For example, you will have greater success with moving talent across business units for rotational or developmental assignments.

10. Align learning programs with strategic roles.

With limited resources, you can maximize your impact by investing in talent development programs for roles that have the most strategic importance to your organization.

Ask your CEO or COO to identify which roles will be key to the growth of the company. Which roles will offer the greatest competitive advantage: project management, business development,

customer service, finance, etc.? This is an efficient way to get strategic alignment and prioritize scarce resources. It is also an approach that is easily understood by the workforce and straightforward for the learning community to deploy.

A role-based development approach allows you to target specific skills for a defined community. We have incorporated our learning strategies into role-based communities of practice and provide clearly defined roles and competency models so that employees understand development paths within their areas of discipline. At CSC, over 400 global roles have been profiled. A handful of the most strategic roles are selected with an executive advisory board, which provides input about the development of core leadership programs for those roles.



Holly Huntley, Global Chief Learning Officer, CSC

Holly Huntley serves as the Global Chief Learning Officer for CSC, a leading global IT services company. In that role, she leads the Enterprise Learning & Talent Development function for a global workforce of nearly 92,000 employees. She sets the strategic direction for the learning solutions and development programs across CSC and directs the CLO Council. In addition to developing business processes to ensure compliance with standards such as SEI/CMM, Ms. Huntley's areas of expertise include leadership development, executive coaching, organizational change, performance management systems, succession planning, conflict management, e-Learning, and facilitation.

[Click here for Holly Huntley's Podcasts](http://learningwiki.editme.com/clopodcasthuntley)
<http://learningwiki.editme.com/clopodcasthuntley>

Chapter 3: The Team of a CLO

By Holly Huntley, Global Chief Learning Officer, CSC

I believe that a diverse portfolio of professional backgrounds will serve a CLO well. I recall when I first stepped into the global CLO role; I felt I had too many traditionally trained instructional designers and educators and not enough team members that understood the business first-hand. I started to recruit folks that had been out in the field who could complement the classically trained practitioners. I find the training function can often serve as a great rotational assignment for a high potential or emerging leader.

Organizational size will probably drive what type of functional specialties a CLO needs. In a large organization, I have found communications and marketing to be huge focus areas. I have a full time communications leader dedicated to promoting the brand of enterprise learning and talent development. My senior leadership team meets weekly to review strategic communications to ensure consistency and to stay disciplined in communication planning, which can be an important lever for organizational change. Yes, branding inside the organization is big part of what we do.

I also have a Project Management Office function that focuses on strategic alliance partnerships. For strategic alliances, we prioritize partners who understand the value of “co-opetition”: the ability for competitors to collaborate in order to serve a single client better. Training and performance vendors that understand this principle prevail as our long term strategic partners. I expect my vendor partners to collaborate with one another so we can connect the dots between competencies, roles, training programs, talent processes, etc.

The CLO also needs to have internal C-Suite partners (CFO, CIO, CTO, CMO). Who you align with can make or break your ability to serve your organization efficiently and in a meaningful way. How can you complement other functional areas to deliver results? Congruent strategies across these internal functions can be a performance accelerator. You need to think of these functions as organizational enablers rather than the traditional and siloed back office functions.

In terms of what organizational structure best enables a CLO, I strongly suggest a hybrid model that combines both centralized and decentralized elements: centralized to direct strategy for enterprise solution development and cost efficiency of procured services through strategic partners, and decentralized for learning and talent deployment within each business unit or region. This model allows you to align with the CEO’s business strategy. It ensures that you have a consistent point of view at the enterprise level while meeting the unique needs of each local business environment.

I sponsor a CLO council at CSC, where each major business unit elects a CLO to serve as a dotted line into the enterprise learning and talent development function. Members of the CLO council get involved in solution strategy/design and advise on business needs and requirements. Because CLOs represent geographies, industries and lines of business, this is an important community to ensure we have alignment on business needs across diverse business units. It also allows us to co-create solutions and tap into global learning and development resources for enterprise projects.

We have a guiding principle for the CLO Council – “as global as possible, as local as needed” – that serves as a reminder for how to best leverage the hybrid organizational model.

For Holly Huntley’s Bio and PodCasts, please visit page 13.

Chapter 4: The CLO's Team: Building the Basis for Success

By Jonathan Kayes, CLO, CIAU

One could argue that there is little difference between the team a CLO should build to ensure success and the team of any other leader in an organization. While that is generally true, I believe it's worth distinguishing both the common and unique factors of a CLO's vs. other executive teams.

Common Factors:

My guide posts here are from John Kotter's work on leadership - particularly on building a team that brings complementary skills together. As Kotter wrote in his examination of the management of Mary Kay Cosmetics, bringing the right talent mix into the team helps ensure success.

My first priority in this regard is always to forge a close relationship with my deputy. If I'm inheriting a deputy who is already in place, I think it's important to quickly determine his or her skills, how those match with mine and what we may be missing. I also make certain we are always aware of what the other is doing, which usually means a 15-20 minute conversation in the morning to review developments of the previous day and prepare for what's in store for us this day. In order to make sure this is a mix of tactical and strategic issues, we always spend some time looking beyond the immediate event horizon to what is coming up over the next few weeks. And, with the goal of a strategic plan that we create jointly as touchstones, I think it's important to ensure that what we're doing is aligned with the direction of that plan.

While there are a number of useful psychometric instruments that can be used to assist in team building, I'm a qualified Myers-Briggs Type Indicator (MBTI) practitioner and use it to assist in team building. There are many ways to apply this instrument, but for business purposes, what I want to understand about my team - and what I want them to understand about themselves and each other - are how they deal with data and how they engage in decision making.

The data question breaks into whether they are naturally going for the big picture or are grounded in details. Both are invaluable, but I want to see a healthy mix of the two and be able to ask the right questions. When my big picture colleague presents an idea, how strongly is it based on specific data? In discussion with my data hounds, are they looking up and seeing implications beyond the specifics of today's problem set?

On the decision making front, are you someone who is going to drive for closure or someone who prefers to keep options open as we move forward? If a deadline is looming, I may need to press the latter so that items appear on my desk when I need them. But, when time is a less critical factor, my conversation with a colleague urging closure may be to step back and bring a couple of new factors into the equation.

The best teams encompass these variations of approach and mutual fluency with each others' tendencies.

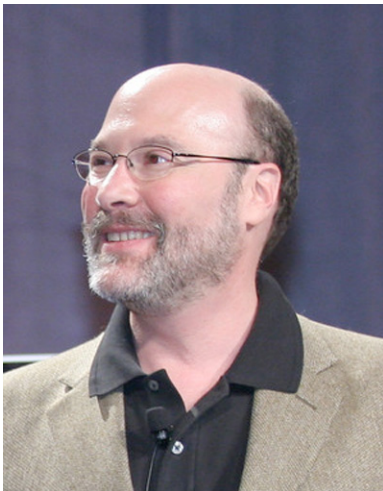
Unique Factors:

There are two issues that strike me as specific to the CLO's world. In combination, they may not be entirely unique, but they will clearly affect a CLO's success. The first is change management and the second is technical fluency.

I would argue that particularly effective organizations use training and education as levers to drive both tactical and strategic change. For example, a new product line requires training the sales force; this is a tactical change. Aligning the company around the impact of higher energy costs would be a strategic intervention. Members of the CLO's team needs to understand how to deliver the training in support of change and, individually, be highly adept at change management.

Without a doubt, technology enables learning (whether it's in the form of WBT available on my desktop or the LMS/LCMS tools that allow a CLO to oversee the design, development, delivery and measurement of training). Depending on the size of my team, I want one or several of them to be skilled learning technologists in their own right, but I need to develop additional networks inside and outside the company. The inside network keeps us tied into changes in IT governance and areas where technology is being used as part of a business application. The outside network should keep us abreast of what's being tried and tested, from delivery tools to new systems features.

Overall, I want empowered team members with excellent communication skills. They should be tied into the goals of the business and personally invested in the power that learning has to improve any workforce.



Jonathan Kayes, CLO, CIAU

Jonathan M. Kayes has served with the Central Intelligence Agency since 1983 and as the Agency's first Chief Learning Officer since April 2006. In the CLO position he has been an active advocate of online learning and leadership development. The majority of Jonathan's career has been in the Clandestine Service, splitting his assignments between the field and jobs at CIA HQS. While much of his work has focused on East Asia, he has also covered weapons proliferation, telecommunications and terrorism. Jonathan is a native of St. Louis where he attended the John Burroughs School. He graduated from Columbia University with a B.A. in Political Science. He also did Master's work at the Columbia School of International Affairs. Among other awards, the CIA has awarded Jonathan the Intelligence Commendation Medal and the Donovan Award.

[Click Here for Jonathan Kayes' PodCast](http://learningwiki.editme.com/clopodcastkayes)
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Chapter 5: Building the CLO's Leadership Team

By Tom Kelly

Assembling the senior leadership team that reports to the CLO is a difficult and daunting task. It might even be more difficult than creating a comparable team for most of a CLO's peers, such as the Global Sales Executive, Chief Marketing Officer, Chief Financial Officer or Chief of Development. While none of these executives have an "easy" job of establishing teams, the CLO has perhaps the greatest challenge. Why? There seem to be several contributing factors:

Broad or focused skill sets in the Functions (beyond management and leadership)

In Sales, there is a clear development path for professionals and a focused arena to master. If one learns to sell well, conventional wisdom is that one can learn to sell anything (using the different sales methods that vary by industry and company). Get a sound foundation (technology, pharmaceuticals, energy) and one can move around that industry sector selling a variety of products for several different companies. Establish a record of success selling in a market or region (Asia, Europe, the Americas, etc.) and you become a candidate to manage that region, or one of the markets inside it. Selling skills, product/industry knowledge and regional expertise are the cornerstones of a great sales leadership team.

What about the Finance team? Is a broad or narrow skill set required? Generally accepted or regulated accounting practices (and variations by geography) of the industry you work in seem to be the cornerstone of those teams.

For the Development or Engineering team, a very strong background in engineering and product development are common characteristics of executive team members.

Clear, measurable goals and metrics of success in the Functions

The Sales team has the clearest goal set in any company: did you make your number or not? Whether it's units sold, margin achieved or dollars/euros/yen booked, the sales organization knows when it's successful and when it's not. Sales professionals are completely clear about their roles and the impact their performance has on the enterprise that employs them.

In Finance, there is a different kind of certainty that is much farther from the spotlight than the Sales effort. Were all the government report requirements met in each of the countries we operate in? Did we follow the proper policy, procedures and regulations in each of those markets? Have we established consistent processes for monitoring and accurately forecasting our operations? Finance is the keeper of the general health of the enterprise. Finance professionals diagnose financial problems and prescribe methods of fixing them. Their role and metrics are clearly delineated.

With Engineering, the metrics come down to a fairly narrow set: did our products launch on time? Did the product quality meet or exceed our own and our customers' expectations? Depending on how the team answers those questions, they can know almost immediately the impact on the general health of the enterprise.

In those two areas alone, how does the CLO's leadership team differ?

Broad or focused skill sets in the Learning Organization

The true CLO, the senior learning leader in a company, is responsible for development (training and education) of the entire enterprise, as well as the ecosystem that extends and supports the enterprise. That includes, but is not limited to:

The Sales Organization: account managers, technical sales support, resellers and channel partners. Topics probably include the sales methodology, vertical market differences, regional and cultural variations, product features/functions and solutions. In addition, there are all the policies and tools necessary to function in this company.

The Services Organization: professional services and customer support employees have different skills and need substantially different knowledge than the sales team.

The breadth and complexity of the CLO's team continues increasing across the Product Development, IT and Marketing teams, not to mention the customer population who buys the products/services.

In addition, the CLO's team is responsible for training and educating all employees about benefits, policies and proper conduct (regulations and compliance vary dramatically by industry but share some common elements, like SEC compliance, EEOC guidelines, Safety and Hazardous Materials, etc).

Do not forget the traditional Executive, Leadership, Management and Employee Development, as well as Performance Management to name just some of the more obvious training categories.

Suffice it to say that hiring a team to address this incredibly broad, complex responsibility is so difficult that several component elements are often broken out and report directly to functions instead of the CLO. If that is the case, problems may arise, such as incompatible content tools, competing infrastructures, incompatible data structures (resulting in incomplete reporting), talent shortages, internal competition for duplicate resources, funding limitations and conflicting priorities. The extra cost of these separate training fiefdoms is huge, but often accepted by the enterprise based on executive control or trust issues.

Clear, measurable goals and metrics of success for the Learning Function

Traditionally, the reporting by CLOs and training leaders has been around cost justification: number of people trained, classroom utilization, number of courses developed and deployed, number of training days/hours delivered, videos viewed, modules downloaded, sessions launched, etc.

None of those "metrics" reflect any impact on the goals of the enterprise. Those are "busy-ness" metrics: not business metrics. They are of no real interest or value to the CEO or the other C-Suite executives in the company. If they do not impact company success, what value are they? If the metrics are not valuable, how does the Learning organization measure its impact and importance to the enterprise?

Who wants to work in an organization that struggles mightily to justify its existence each and every quarter? Every budget cycle?

That brings us to another reason it is difficult to form the CLO leadership team. Where is the pool of learning executives and learning leaders? The complexity of the position begs for a business-oriented perspective and, hopefully, strong functional experience in line organizations that make up the “audience” groups the CLO and his/her team serve. Add to that the need to care passionately about those audiences and the intangibles that make learning activity so diverse across individual, cultural and geographic differences. Where is that pool of talent being developed? In Human Resources? Product Marketing? Sales? Product Development?

Maybe that talent is being developed and nurtured within the internal training group(s). That would be the natural place to look for those people, but all too often, training professionals are not viewed as business people. They have trouble proving their value to the company, are seldom able to meet the expectations of a diverse group of functional executives and generally disappoint their audiences. Have you met a lot of learning executives that have been responsible for Training and Education who have been in that segment of the industry for 15-20 years (like the senior sales leaders, CMO, CFO, or even the senior leaders reporting to them)? Probably not.

The senior leadership team that supports the CLO is an unusually difficult one to assemble, and if you are lucky enough to inherit, hire, build or develop such a team, you will find its members to be in great demand, highly marketable and frequently called and recruited by other companies.

Learning leaders are rare commodities in the private sector because of their broad skill sets, big-picture perspectives, passionate commitment to people and learning, and their motivation to make a difference in the enterprise and the world.



Tom Kelly

Tom Kelly is a senior executive in corporate learning with 30 years' experience in Education, Learning and Communications at high tech companies (Network Appliance, Cisco Systems, Oracle Corporation, Sun Microsystems, etc.). Tom has spent 25 years in Executive Leadership and Management, 20 years working with international and domestic partners, employees and customers, 16 years growing P&L responsibility with budgets of up to \$94 million, and 14 years designing, planning and implementing e-Learning tools, applications and portals for employees, partners and customers. A frequent writer, Tom is also a keynote speaker and panelist at domestic and international conferences.

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Chapter 6: CLO Field Guide - Tips for Hiring and Building a Great Team

By Tom Kelly

The task of hiring a great leadership team to support your role as CLO is an unusually difficult one. As the breadth of your charter in the enterprise increases, so does the complexity of this one essential task. There are a few things you can do to increase the probability of successfully assembling this team: not just finding skilled, experienced individuals (a challenge in itself), but building a strong, cohesive effective team.

Tip #1: Hire Great Individuals

Find candidates with values that are similar to yours.

Everyone has a value set: a personal code that guides their everyday decisions. If what motivates and invigorates you has a similar effect on your team member, you will both enjoy the work environment much more. Often, though, leaders communicate their vision or mission as their values. Your vision is the destination; your values are what make the journey easier and more enjoyable (or not). Can you sum up your value set in one paragraph? In one sentence? Have you ever tried?

One actual example of an executive's value set is summed up in four words: "Fair, Positive, Constructive and Collaborative". He reminded us when we broke from it that "If you cannot work that way, it's best to take this opportunity to expand your work experience and resume." When he reminded his entire organization of this foundational necessity - this code - he also instructed them that "You have the right, in fact, the obligation to call me on it if I or any member of the leadership team does not act in accordance with our stated values." That was one empowered team.

Where do you find great individuals to lead the Learning Function?

Look inside the enterprise - outside the traditional HR and Training communities - first. When you bring individuals on board with internal functional expertise, they have instant credibility. This kind of role will be more attractive as a rotation of 18-24 months that broadens their international experience and prepares them for the next step up in their careers. Look for stars in functional areas who have reason to consider alternatives (their spouse is having a baby, they are getting married or building a new house, they're tired of travel or are simply looking for some other way to make an impact, etc.). The candidates may not have much "management" experience...yet. Have they led teams or projects? Have they been held accountable for some effort that required cross-functional teamwork or partnerships? If you find great people you can train great teams and great leaders.

What do they look like if they are not "training" or "learning" professionals?

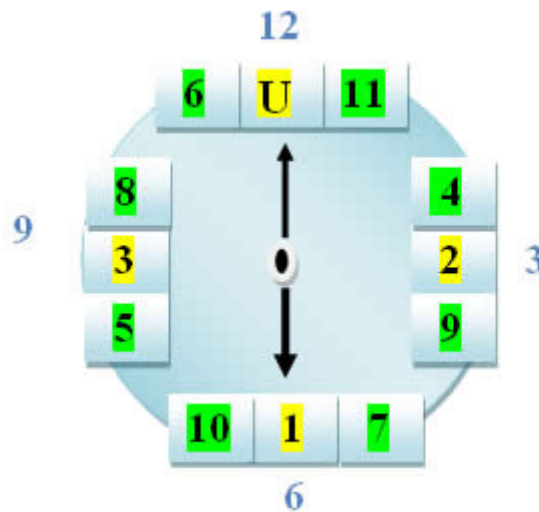
They are action-oriented implementers with a partner mentality. That means they can and will get things done, but know they can accomplish more when they engage with others to extend their reach and skill set. You'll find them giving the most honest and thorough feedback on training plans, products and processes. It differs from the complaining feedback (at least a little) in that it contains alternatives, suggestions and solutions. They often volunteer to pilot or review new learning materials or programs. The people you are looking for are already known as good communicators; they improve the processes or work of others and share the changes openly (not usually caring about attribution). They look for solutions without blame and they are creative problem solvers, often proposing unusual (unrealistic?) alternatives and paths to new methods. The very best candidates will have different skill sets and perspectives than you do, but very similar values that bind them as a future team.

Tip #2: Hire A “Full Clock”

Great individuals do not always make great team members. When you find great people, how do you compare them and their strengths with yours and others to find all of the pieces of a great team? Try using **The Clock Model**. It begins with Values as that center pin in the middle of a clock face (that point around which the hands rotate). Next, put yourself in the spot where the 12 is located on the clock face. Let’s look at a rather simplistic example:

Let’s say that you are a decisive, visionary risk taker, focused on action and execution (some might say you are pushy or impatient). If you can only have 3 people on your team, the first three great individuals you should be looking for will fill in the 6, 9 and 3 o’clock positions on that clock face. Aside from all the other qualities and values, at least one should be very detail oriented and cautious (your 6 o’clock). One should be pragmatic and practical (let’s say the 9 o’clock), and the third (at 3 o’clock) is maybe driven by operational excellence. With all the other elements, characteristics and nuances that people bring to the table, if you can find opposite kinds of skills, experiences, and perspectives to fill in the gaps on the clock (in essence, your own gaps), you will have assembled the right raw talent to build a great team.

The Clock Model is a metaphor that helps you fill those gaps consciously and systematically. The figure below is a “Full Clock”, with a center pin of values and an example order of hiring.



The key is to hire opposites to counter-balance great (strong) individual leaders: opposites in terms of style as well as experiences, perspectives and approaches. That seems counter-intuitive to success because, on the surface, you just hired a team primed for hostility, conflict, strife and delay. But, if they have a common set of values, if they fundamentally agree on how and why they are going to work together, then the real fighting is over and their discussions will be about how to successfully achieve those goals and that vision.

The conversations amongst this team will be spirited and sometimes frustrating, but better decisions will be made because of its diverse perspectives; fewer missteps will be taken because of the breadth of alternatives. The team grows stronger because of the push and pull, the give and take, and the learning that happens as a result of those conversations.

Tip #3: Model and Require Transparency

A productive, successful, cohesive team of strong leaders is built and maintained from top to bottom – from CLO through other leaders to individual contributors – first and foremost with trust. Trust is the glue that makes teams effective and holds organizations together: not charisma, or bonuses or anything else. While those things are important, without a rich, trusting environment, they are insufficient.

One of the key elements in building trust is transparency. People have to know what your values are so that they can understand your priorities and your decisions. If they don't understand you, they will create their own explanations based on prior experiences, past leadership or something else.

To be led, people need to connect. If there are too many employees for you to reach out and connect with, you must make it easy for them to connect with you. Expressing values similar to theirs is one easy way of forging that connection. Give examples, tell stories and reward behavior that reinforces shared values; make it easy for them to connect with you.

A great opportunity to model transparency is when announcing a new project, program or change of some kind. Anchor the announcement to the organizational values, to the vision, and show how it all fits together as part of who you are and what “we” are all trying to do. Explain each visible decision, any noticeable impact and organizational outcome, and even address some of the rumors in the context of your values and those of the team. In a relatively short time, you will have solidified the desired organizational culture, personality and atmosphere. When people trust you, they work more cohesively and effectively together. Transparency at all levels builds trust, and trust is the foundational element of a great team.

Tip #4: Be Boringly Consistent

One of the things most leaders require of their teams and reports is “No Surprises” -especially no bad surprises – but, generally speaking, no surprises. None. And it is completely fair for them to expect the same from you. With each decision, follow your public priorities, tie it to the vision, remind people of why it's necessary (painful or not). Keep to the path that you and the whole team are set on. If you change that path often or dramatically - with little or no warning, or with a poor explanation - the foundation of trust and transparency will start to crumble under your leadership. You do not need to be boring or irritatingly repetitive to be a constant source of inspiration and the solid rock upon which the team's foundation is built. You do have to keep your decisions, the vision, values and pathways as clear and consistent as you can, even at some political risk to yourself.

To build a great team, you must be a great leader, and great leaders come in all sizes, genders, colors and creeds. They have some common characteristics, but vastly different approaches and styles. Each has a code they follow (values), hires well (a full clock), builds trust (transparency) and doesn't surprise their teams (boring consistency). That kind of leadership (from top to bottom) builds cohesive, loyal, high-performing teams in high-functioning organizations.

For Tom Kelly's Bio and PodCasts, please visit page 19.

Chapter 7: Life Cycle of a CLO

By Martha Soehren – CLO, Comcast

Chief Learning Officers have tough jobs! Our worlds are complicated by a competitive landscape, trying to keep up, getting to the right tables and helping the business distinguish information needs from performance management issues – while delivering learning solutions. We might occasionally see training highlighted as a positive in employee pulse/engagement survey data; however, as we all know, training can be the problem OR it can be the solution. It all depends. The way a company reacts to training defines the life cycle of its CLO.

Many companies still struggle with including a CLO at the executive table where business philosophy and strategies are discussed. Some struggle with where the CLO and learning organization fit into the company's overall structure. Some expect the CLO to manage the entire life cycle of their employees; others don't. The tenure of CLOs varies from company to company too. Is it possible that we're all learning from those CLOs who've moved on - not because they failed - but because they paved the way for other CLOs to learn from their experiences?

The success of CLOs has more to do with their education, experience and competencies than with how their positions are aligned within organizational structures. Some very smart people serve as CLOs and they vary in background and experience. Their "fit" with a business, as well as its culture, can define their level of success.

Why bring this up? A CLO's fit with the position and organizational culture has more to do with defining his or her life cycle than does the history of the position. In considering the culture, including the pace of the work, change and business, some keys to extending that life cycle include:

- Recognize that the CLO is responsible for defining the L&D strategy, and not at the expense of the tactics that keep the front-line employees in touch with the business and their jobs. Balance strategy and tactics: the business depends upon it.
- Accept the fact that corporate politics generally rule the day. There will be tables with empty seats and your name won't be on them. Get your name on the ones you can; others will catch on and start offering you seats at their tables.
- Know that delivering quality learning solutions that make learning easier, that are relevant to the business, and that are within cost and schedule have more to do with making the CLO a winner than any other measurable aspects of the role.
- Recognize that technology and software need to be aligned to support e-Learning solutions: just in time, especially for the front-line employees.
- Fit into the culture. Live and breathe the values of the business. Walk the talk of connecting learning to the business and its culture. Understand that culture and recognize that it takes time to create that understanding. Sometimes it requires humbleness.
- Know your business partners. Stay connected to them; ask what they think and know what they need. Then, deliver on expectations.

Maybe those CLOs whose life cycles were short had many strong attributes and they are each very successful now in roles that better match their experience and education. They paved the way for the strong Corporate Universities that exist today. In many ways, the steps they took are extending the life cycle of current CLOs. How long is my life cycle? And yours? I'm not really sure, although I will admit that there are days when I walk out the door and ask, "Just how long-lived am I?"

Thanks to all the CLOs who help each other. We're fairly new to the L&D world and are truly making a positive difference while extending the assumed short-lived life cycle of the CLO.



Martha Soehren – CLO, Comcast

Martha Soehren is the Chief Learning Officer and Senior Vice President for Comcast University and Comcast. She holds undergraduate and graduate degrees in business, and a PhD in Educational Leadership and Policy Studies. Martha has 8 years of experience with the Telecommunications Industry, 25 years with the Defense Industry, and 13 years experience as an adjunct professor, research advisor and academic advisor. She is the recipient of the Liberty Award for Leadership from the Philadelphia Chapter of Women in Cable and Telecommunications (WICT), is the Mentor Advisor for the Philadelphia Chapter of WICT, and is on the National Board for WICT. Martha serves on academic boards for the Wharton School of the University of Pennsylvania, Rochester Institute of Technology and Jones International University.

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Chapter 8: The Intersection with Talent Management

By Martha Soehren – CLO, Comcast

Companies across the globe are engaging in analysis and management of the entire employee life cycle: from selection to retirement. In that process, great effort is extended to ensure that promotions and succession planning are executed in thoughtful ways that support the business. And yes, with thoughtful talent management, exits are chosen carefully as well.

Talent management is increasingly a part of the corporate strategy for most organizations and that strategy includes recognizing and responding to the competitive war for talent. It's more than identifying, acquiring and developing the talent: competition is driving us to more work-life flexibility that accommodates life styles and learning styles across the employee base, particularly for the techno-savvy younger generation. We are indeed at an intersection with Talent Management and we must shift our thinking around work-life flexibility as much as we must shift how we attract and retain great talent.

Companies want employees who drive business objectives and employees want companies that define and grow their careers while recognizing that an employee may have several careers over his/her work life. A robust Human Capital Management System is an important tool for managing the life cycle of an employee, which encompasses how that employee is recruited, trained, developed, managed, measured, promoted and, yes, paid with competitive salaries that are linked to job competencies and expectations, as well as what the market deems fair.

Some organizations incorporate Talent Management well and others are still implementing the tools and systems to drive it. Regardless of our own level of experience, at this intersection, we can learn from the best practices of others and build higher levels of excellence in the Talent Management systems that are working well, and in those that need help. Sharing best practices is easy to do through platforms like wikis and at conferences like Learning 200X, Elliott Masie's annual event.

For Martha Soehren's Bio and PodCasts, please visit page 24.

Chapter 9: Importance of Learning in Building World-Class Talent

By Donnee Ramelli

“Leadership and learning are indispensable to each other...” - *John F. Kennedy*

“You bet on people, not strategies” is one of the axioms we used at AlliedSignal/Honeywell during its turnaround, led by Larry Bossidy in the early ‘90s. AlliedSignal was my first of three turnarounds and in each one, we made progress and had to deal with setbacks and challenges. We had terrific talent: eager to learn, grow and, eventually, lead and coach. For all the numbers, technical jargon and marketing speak, business is a “people sport” focused on talent that can drive sustainable performance and results, and quickly deal with the change and turbulence that many companies face today.

Larry required all business leaders at AlliedSignal/Honeywell to know their people just as well as they knew their business strategy and enterprise operations. He hosted talent reviews twice a year to discuss performance, potential and learning/development plans with each business’s top talent and leaders. Larry could name and profile about 400 key executives and managers across our global business, identify their potential and the next move to accelerate their development. While many leaders initially complained about this talent review in the first year, all realized the power in recruiting and developing “A+ players”.

During my seven years with AlliedSignal/Honeywell, we coached our talented performers to drive amazing results and value. Our quality metrics soared, profits rose by 12% to 15% per year and the stock moved from \$6 to \$63 per share. We were enriched by our focus on talent and performance. It drove our capability, confidence and success.

General Motors’ leadership devoted the same energy and intensity to making sure top executives knew and developed their leaders and key talent. Top leaders focused on making GM faster and more focused. They recognized that the quickest path was to involve leaders in assessing, developing and teaching the great talent we had. Where we were successful, you could find leaders that built great talent, teams and businesses; where we stumbled, you would find leaders that were still living in the past and making excuses.

Leadership at Fannie Mae was focused on transforming the enterprise into a performance-driven culture that focused on customers, marketplace and mission: building a culture that could move quickly to create innovative products and services to improve liquidity, stability and affordability in the housing market. They have focused on talent recruitment, development and building bench strength, along with raising the bar on performance, bias for action and driving execution and results. The ability of the company to deal with the challenges and changes in the last six months is a testament to how focused and change-agile its culture has become.

I have been lucky to be part of three turnarounds and three leadership teams who believed that talent is a competitive advantage and that fast learning can build sustainable competitive advantage. After the last six months of turbulence, the teams at these organizations have been the key sources of energy, innovation and performance to keep their businesses alive. While no one was ready for the level of financial turbulence that would accelerate this deep recession, my bet is that companies that continue to grow and develop world-class talent will lead the recovery.

The key is to...

Focus on People and Performance:

One key learning for me during the past few years and market collapse of 2008 has been that Larry Bossidy and subsequent leaders at AlliedSignal/Honeywell built sustainable success because the leadership team kept focused on people and performance. The other turnarounds (GM and Fannie Mae) didn't move as quickly to change the leadership and performance culture and, unfortunately, market forces and economic conditions threaten their progress and indeed their survival. Moving quickly while focusing on people and performance drives your organization toward a bright future.

Business Case for Building World-Class Talent: The Headlines

What is the business case for building world-class talent? Let me steal from some common themes we have all experienced over the last few years. I'll share the headlines and then the full story.

1. The world is growing smaller and more competitive every month.
2. Customers expect more and more every day – and the competition works every night.
3. Ideas, innovation and initiative can change the game.
4. Managing change and driving execution separate the winners from the losers.
5. If change is constant, learning must be continuous.
6. Talent is a competitive advantage and fast learning can build sustainable competitive advantage.

The Full Story on the Business Case – Global Competition Will Drive Change and Learning

Let me discuss the story of the business case and expand on these headlines. Consider these actions as you create own your CLO strategy to build world-class talent for your enterprise.

1. The world is growing smaller and more competitive every month.

The global competition for resources, capability, ideas and business/technical expertise has touched nearly every business headline and every business I have been around since 1990. The recent jump in oil prices from \$60 [per barrel] to \$150 and back to \$40 shows the intense demand for resources and the volatility of demand and value.

The fight for talent in key developing markets is just as intense, just as pricey and just as volatile. Why? Because talent is the energy that drives global business expansion. I monitored regional talent in one developing country and watched it grow from \$30K/year to \$150K/year in four years.

The strategies to develop global, regional and national talent have been intense during the last 15 years to ensure that global expansion is truly sustainable and benefits from the diverse business and market perspectives of the global workforce. You have to have great talent on the ground in any business – global or local – in order to win.

Action: Get global. Understand and leverage global talent, perspectives and ideas.

2. Customers expect more and more every day – and the competition works every night.

In 1995, I went to Singapore to help lead a Six Sigma training session. Everyone was eager to develop this capability but some thought it was a fad or corporate directive. A year later, I would visit an electronics plant in the region and see that they had completely adopted the Six Sigma approach, tools and metrics and taught all of their operating managers the basics. While this was already one of our best plants, they had to compete with much higher quality from other regional suppliers to win customers; without customers, they knew they had no future. Their motto was “Beat the Numbers”. They didn’t mean profits. They meant beat the competitions’ quality numbers, and they knew sales and profits would follow.

Action: Focus on hot skills that can help your customers be successful and your business be profitable. This is 100X more important than your average offerings.

3. Ideas, innovation and initiative can change the game.

The difference between a *learning* organization and a *knowing* organization is curiosity and the willingness to discuss, debate and dialogue about ideas that can change the game. Knowing organizations are great at “killing new ideas on arrival”. Learning organizations like to have all ideas on the table to think about, build on, modify, pilot and tailor. Artists need lots of colors; innovators need lots of ideas.

Action: Find the innovative groups in your business. Use their examples, methods and case studies to show managers how to get the full potential from their talented teams and how to implement innovation successfully.

4. Managing change and driving execution separate the winners from the losers.

Turning ideas into results that are meaningful to the customer means winning in the businesses I have been in. Talking about change isn’t as important as managing the change in a way that drives real execution of business operations that deliver superior results. This has to be at the heart of the organization. The more compelling and visible the metrics and results, and the more common it is to hold in-depth reviews of operations and customer satisfaction, the more likely the enterprise/ team will drive the right business outcomes.

One of our most important global initiatives at GM used the change model to drive the restart of a failing business that had two different country cultures in common. Two years later, revenues were over \$1 billion. Soon, the business was profitable enough to help GM through some tough times and became a benchmark in its region of the world. The managers involved in that change were 10X more capable than average managers and were soon picked to run other great parts of the global business.

Action: Make sure management/executive development offerings provide the practical tools and techniques for managing change and driving execution. That should be the leadership brand of the future for most enterprises.

5. If change is constant, learning must be continuous.

All the change in the global marketplace, new science and materials, and information and communication technology means that learning must be paced to keep up with new techniques, approaches and applications that drive competitive advantage and sustain business excellence. Benchmark enterprises actually spend a great deal of resources to research, experiment with and pilot new changes to give them an edge in their markets.

Action: Learning raises the bar on performance and serves as a catalyst for individuals and teams to rethink and reinvent the future. When you stop learning, the game is over. Ensure that learning is focused on hot skills and mission-critical competitive capabilities. Leaders must know their role in advocating for and leveraging learning, and in driving big change.

6. Talent is a competitive advantage...and fast learning can build sustainable competitive advantage.

If talent is the energy and intellect that powers the business model, accelerating an enterprise's learning builds the capability to outthink and outsmart the competition, to sense and attack key industry trends and opportunities.

Action: Make fast learning your mantra. It drives value, saves time/money and puts your company in the lead!

Three Big Wrinkles for the Future of Learning and Building World-Class Talent

The first big wrinkle in our future? Gen X and NeXt: the new generations and how they learn.

If the business case for talent is understood and acted on, we may become sufficient in building the right talent and bench strength for our business today. The problem is tomorrow.

The new generations in America are different and will change the rules in business and learning as they become a larger force in our enterprises. The good news is that they may be better equipped to deal with the fast-paced, global, digital, team-oriented, multitasking, wireless, mobile business environment than my generation, which grew up with dial phones and faxes. I believe they want to be part of something important, noble, diverse, global and fun that is loaded with technology and challenge. They want a positive environment, challenging assignments, high-end/valuable learning focused on hot skills and competitive capabilities, a fun/friendly team environment – and they expect to have their voices heard, be well paid and respected.

Learning Preferences for the New Generations – Multitasking, Digital, Fast/Furious, WIWI (When I Want It!)

They will have 10 careers - not 2. They move when they are bored. "Hire-Inspire-Retire" will be replaced by "What's Next? Let Me Play-Win-Lead!!" Keeping them challenged and fully engaged is key to retention and fully leveraging their potential. From what I have seen, their learning preferences are largely those of someone who likes to be multitasked.

The good ones are self-directed and can find cool learning or anything else they want on Google, MySpace, YouTube or FaceBook, so CLOs are competing for mindshare in a virtual world. Hint - You'd better have a cool portal with exciting, entertaining content that produces the right hot skills and cool tools, or you will be "Wi-Fi Toast!!"

They love the newest technology and like to learn in teams or with friends. They like to work on challenging projects or solve difficult problems; they want more engaging experiences, cool tools and short, practical lectures. They want more entertainment and excitement in their environment and their learning.

If their numbers are expanding in your enterprise, they are your new customer, your new talent and future bench strength: make their learning fun, cool and fast!!

The second wrinkle in the future of Learning? Global Talent!!

Global talent enriches the mix of ideas, solutions, breakthroughs, benchmarks and, for businesses in the global marketplace, it is key to understanding and innovating throughout your global value chain. This part of the future is not clear and may be a little scary, but I have seen terrific successes over the last 10 years where people took time to know each other and to understand and respect the cultures and customs of every team member. It's surprising what a smile, a hand shake and bit of relationship building can set into motion. I got to see a lot of pride and camaraderie on the part of our global teams in AlliedSignal and GM, and it really came down to great people wanting to work together for global success. The underlying foundation came from understanding, trust, respect, commitment and – ultimately – friendship.

The third wrinkle is technology.

Will technology make corporate learning efforts obsolete or provide unbelievable leverage and acceleration? Good question! The answer depends on you and your team, and how well you master new technology. Have you mastered an understanding of how the value players in your enterprise get work done now and how they will win in the future? Keep reading. The next section may provide some clarity.



Donnee Ramelli

Donnee Ramelli was most recently (2007-2008) responsible for design, development and implementation of learning strategies and programs to improve the performance and capability of Fannie Mae professionals and to advance Fannie Mae's \$3T financial services business. He defined the strategic learning initiatives and programs for Fannie Mae and led the efforts to develop and procure enterprise and business unit learning programs. Previously, Ramelli served as President of General Motors University, Vice President for Learning and Organization Development at AlliedSignal, and Director of Quality and Productivity Engagements for Coopers and Lybrand in Washington, D.C.

[Click here for Donnee Ramelli's PodCasts](http://learningwiki.editme.com/clopodcastramelli)
<http://learningwiki.editme.com/clopodcastramelli>

Chapter 10: The Role of Technology

By Holly Huntley, Global Chief Learning Officer, CSC

On-Demand Learning

Over the last two decades, technology's role in learning has evolved through different stages of utility and rates of adoption. I have observed through each phase a change in learners' perceptions, expectations and learning styles. Digital disruptions like digital video recorders have created an on-demand learning culture, which means that many of our traditional views of training no longer apply. With this acknowledgement, let's kill the PowerPoint learning culture once and for all; it's based on the old model of "expert knows best" and doesn't take into account learner needs, interests and existing capabilities.

The First Wave of e-Learning: Global Reach

In the early 90s, we were building our own CBTs as a way to level the playing field and broaden access to knowledge and information globally. As we rapidly grew through acquisitions, technology helped to address our growing scale problem. With this focus on global accessibility, training was no longer a reward for the elite few or for those in close proximity to headquarters. This shift challenged the notion that "knowledge is power" by broadening access to information for all. The organization had to adjust from strongly held beliefs about formal training and make the transition to embrace the value of informal learning. This behavior shift proved very difficult as many were still holding onto the virtues of formal training as a reward. The concept of self service proved difficult for many who defined training as a scheduled event where an expert directed their learning on company funded time.

The Second Wave of e-Learning: Efficiency & Speed

The second wave of e-Learning was about cost efficiency. After the dot-com bust, companies were looking for ways to cut costs. e-Learning provided a lower cost alternative to traditional bricks and mortar training centers; money could be saved on travel and overhead costs.

Unfortunately, during this phase, a lot of content was amassed with little forethought of its design or usability. This was an era in which we tried to replicate traditional training design using new media. Our approach was largely "blended". We found that pre and post training activities easily lent themselves to virtual learning modes and served as a way to ramp up learners quickly and facilitate on-the-job application.

During this period, the industry also suffered from some commonly held misconceptions. Many early adopters who experienced the initial page-turning CBTs had to be convinced that learning technologies had evolved. Others showed resistance to e-Learning because they believed it was purely a cost cutting measure and did not believe the company was making an investment in employee development.

The Third Wave of e-Learning: Networked Innovation (Mashed up learning)

Web 2.0/Enterprise 2.0 ushered in the third wave of web-based learning, which is driven by innovation and collaboration. The promise of e-Learning is finally seeing a return. Digital natives and digital immigrants alike inherently find value in connecting with their networks in real time. An explosion of collaborative technologies is taking root.

With over 90,000 knowledge workers at CSC, five years ago we decided to invest in a digital books collection for the global workforce to keep current in business, IT, engineering, finance, etc. It dramatically changed how people thought about learning as the just-in-time access to information improved their ability to efficiently deliver on projects. Most importantly, employees developed an appreciation for informal learning. Today, we are embedding a variety of performance support tools into our communities of practice and throughout our enterprise portal, ensuring that they are dynamically accessible by employees.

Virtual worlds like Second Life and Qwaq are helping employees learn and connect in new ways. These 3D environments allow employees to experience simulated experiences and apply some of the concepts from the “serious games” movement. They also change some dynamics of work by eliminating first impressions/biases that can surface unconsciously when we’re able to see each others’ physical attributes.

I have experienced telepresence and there is no turning back. I believe the mash-up of telepresence and virtual worlds will introduce a new digital disruption to education that will radically change our learning ecosystems in ways that previously could only be experienced through watching *Star Trek*.

These technologies need to be applied across all internal systems: not just learning. At CSC, we are starting to apply a social networking construct to all talent management processes. Employees will be able to tap into their networks for performance feedback and career coaching. This shift gives more control to the employee, changes the employee-manager relationship and increases transparency.

Looking back, during the initial wave of self-service learning, technologists were often the early adopters. Today, employees across all functions see the value in time shifting for learning new skills and accessing knowledge to accomplish work tasks.

We are starting to realize the true promise of e-Learning as it has become embedded in the flow of daily work and transcends across all generations. The “metaverse” provides endless possibilities for how we can learn, grow and collaborate.

Edutainment

Expectations are changing to the point that sometimes I feel like I am in the “edutainment business.” Educating people is no longer enough. Learners expect to be engaged and entertained more than ever as they are exposed to a variety of stimulating and on-demand media sources on a daily basis. Learning modes need to be equally engaging, which means that learning professionals to revisit our roots as storytellers in order to emulate gaming experiences. The Wii has proven that games are not only for young adolescent males trying to live out their fantasies. Games can be an important outlet for self-expression and social connection for all types of people.

Viral Change

Consider technological advancements from a human change perspective; that will serve as your most valuable vantage point. As you look to implement new technologies, include a change management strategy in your project plan and invite org change experts to be part of your deployment team. Our experience at CSC has demonstrated that a sound change management methodology is critical to user acceptance and adoption of new learning technologies. We have invested in training to educate change agents, champions and sponsors on their roles in the change process.

Explicitly address the change that new technology represents with learners so they clearly understand its benefits and drivers; however, as change is introduced more rapidly, we are finding the need to intentionally rely more on viral change approaches rather than methodically-planned transformations. Using ideation tools to get people directly involved in the change process early on is a good alternative to the overly engineered, resource-intensive change programs of the past.

For Holly Huntley’s Bio and PodCasts, please visit page 13.

Chapter 11: Unlocking the Potential of Learning Management Technology

By Tom Kelly and Mohana Radhakrishnan, Senior Vice President, Customer Services, Expertus

Any Chief Learning Officer (CLO) today readily admits that Learning Management Systems (LMS) and their associated technologies have become indispensable components of corporate learning infrastructures. Why? Because tracking classroom and online courses is important to show activity in the audience, implying positive impact on the enterprise. Having a robust LMS can go a long way toward proving that companies of all sizes are able to realize their potential and that training can have lasting, positive effects on the bottom line.

If the job were only that simple, being a CLO would be a great job, and a great deal more fun.

Our reality is that learning organizations have to move way beyond the capability of the typical LMS today. That specific technology was built to solve a universal training problem: prove our courses are being taken and by whom. That is a pretty limited view, and a pretty narrow definition of success.

Pitfalls to Avoid

When the first LMS appeared on the learning landscape in the mid 1990s, industry pundits hailed them as the cure-all for the ills that afflicted corporate training departments. And to be sure, when used properly, an LMS can indeed prove training adoption and participation. But at its roots, an LMS is essentially a software application, and as with all software, the application is only as effective as the knowledge of the people designing and using it.

Most LMS are quite complex and, if not correctly implemented, integrated with other technologies and used properly, they can actually increase the very inefficiencies and needless expenses they were created to remedy. The issue and the irony, considering the subject, is that there are very few IT or learning professionals who have been adequately trained in how to properly harness the potential of today's complex LMS.

The stakes are high. If a company opts for an LMS to aid its learning processes, then it simply has to do it right, and all too often that means seeking the help of external experts who are focused specifically on learning technology. Internal IT organizations seldom achieve this level of expertise because learning systems, tools and deployments are rarely anywhere near mission-critical status in their IT environment.

There are a few pitfalls that learning organizations must avoid in order to realize the expected benefits an LMS can provide:

- ***Taking too much for granted.*** Internal IT and tech support professionals often label as “low priority” the process of implementing, integrating, using and maintaining an LMS. They do this because it's not mission-critical to the enterprise and because they assume the technology will be easy to support (“It's just a training app”). But, as learning and training professionals know, LMS technology is surprisingly complex. One reason is that LMS touch far more users - the entire internal workforce, partners and large numbers of individual customers - than customer relationship management (CRM) applications or most other enterprise software.

- **Customizing to accommodate business processes.** Learning executives and their staff assume the LMS will accommodate their diverse business process needs. When they inevitably find that it does not, they tend to heavily customize it. This is a classic blunder with huge economic impact over many years. It makes ongoing support and maintenance increasingly complex and disproportionately expensive, whether the result of internal system changes or the relatively simple LMS system upgrades. Instead of extensive customizing, CLOs should use this opportunity (of implementing the enterprise-wide LMS) to reexamine their learning-related processes and associated metrics. Then, go through a smarter exercise that addresses those issues, rather than trying to embed process, cultural or measurement differences in the LMS.
- **Assuming actionable intelligence.** Most LMS generate standard reports. Learning leaders assume that these standard reports will give them intelligence and insight that can be acted upon to improve training and its impact on the enterprise. Sad to say, this is one of the weakest areas of most LMS in the market today. They only report on usage: enrollment statistics, completion (or lack thereof), individual tracking, etc. Virtually none of the standard reports help with enterprise success metrics, organizational solutions or corporate relevance. Why does your CEO care about “10,000 student days”? That metric is of no relevance to the achievement of the enterprise goals s/he is tracking.
- **Garbage in, garbage out.** The more people that an organization has entering data into an LMS, the more inconsistencies appear. Whether that data is new classes, schedules, cancellations, costs or student information, the more people involved, the worse the data gets. This practice compromises data integrity and efficiency, leading to more time and expense to correct the problems and clean up the vast database. It can also require more effort to customize the LMS to prevent the problems introduced to the process. Learner searches become increasingly difficult. User adoption slows down and then drops off. Costs increase with complexity. To cap it all off, the CLO may make a presentation to other executives and discover that the numbers are wrong, incomplete or unsupportable.
- **Spending too much money.** The costs of today’s LMS vary widely, and the more expensive ones, of course, tend to be the most complex. These complex offerings are typically built for large enterprises (or those who “will be large soon”), and are often a classic case of overkill. It’s important to know what you really need and then choose an appropriately scaled application. “Buying ahead” and growing into an LMS is a strategy fraught with problems and high costs.

Just as there are pitfalls to avoid, there are best practices to embrace in this arena.

A number of best practices have been identified over the years by learning leaders who (against all odds) have learned the hard way. Here are six nuggets of wisdom that can help you with your learning technology investments:

1. Develop Learning Portals to Increase Adoption

It’s already been pointed out that typical LMS are complex and not necessarily as intuitive as they could or should be.

Developing a learning portal (lying on top of the LMS, filtering the direct contact) that’s easy to use and is more specifically tuned to the needs of individual learners in an ecosystem - internal employees, partners and customers - has been proven to significantly improve user adoption. Such a portal gives learning departments the opportunity to really highlight critical training for their various audiences on a just-in-time basis. Equally important, the portal delivers important information in the flavor, format and context that meets user expectations. Simply put, it’s far easier, more efficient and less expensive to build a learning portal than it is to customize an LMS in both short-term funds and long term total cost of ownership.

From an IT and business perspective, a robust learning portal reduces the load on IT to support and manage the LMS. Ultimately, the total cost of ownership is decreased, because developing a portal with the proper strategy enables organizations to reduce or eliminate significant customization costs. Also, a portal enables learning departments to take a more aggressive marketing approach with training, embedding it in the portal instead of in the off-the-shelf LMS application. This will improve registration and user “stickiness,” and make the overall learning experience far more successful for the internal and external user communities.

2. Develop “Actionable” Reports to Improve Decision Making

How can an organization pull out good data from its learning management system...the kind that really makes a difference in enterprise planning and executive decision-making?

Most underlying LMS data structures are very complex and extremely limited. Building learning business intelligence with data from the LMS alone will not be enough. Feedback and survey data, assessment details, informal training from marketing, sales achievement by region and customer loyalty or satisfaction statistics all reside outside of the LMS. This means that if a CLO is trying to understand whether instructor-led courses are well-attended and conducted in a cost-effective manner, or if the training for the new product launch has been successful, he or she has a team of analysts pulling data from different systems, often manually processing them in laborious and complex spreadsheets. This approach is inefficient and prone to repeated errors.

The key here is to integrate and create “data marts” that pull in additional information from the CRM, PRM and HR systems, as well as data managed locally, like training budgets, vendor spending, survey and feedback results. This enables learning departments to more succinctly focus their reports and pull out data that’s more meaningful and accurate to help make better decisions. This kind of information helps justify additional funding or the re-prioritization of current spending from one functional area to another.

3. Leverage External Vendors for Technology Support

By any measure, learning management technologies are different than most other IT systems. When LMS first starting rolling into enterprises a decade or so ago, the tendency was for IT departments to roll them out and support them using traditional IT models. Because so many training groups across an enterprise manage their learner groups in different ways, training this diverse audience to use the application consistently is very difficult and often results in multiple LMS implementations within one enterprise (another incredibly bad pitfall to avoid).

This is where outside expertise really helps. Partner with learning technology experts who can put together a centralized governance model around standardization. They can help with user adoption and stickiness, making learning more impactful and training dollars stretch further. The right kind of partner possesses not only IT and technical skills, but also understands the need for diversity within the learning organization and learning as a business.

When choosing an outside vendor to assist in the tracking and reporting process, it is important to ensure that the Training Department - not IT - manages that relationship. If possible, the IT organization should be part of the process and governance, but not the owner of the relationship. Either way, document an ongoing support plan and service level agreement that support the choice.

5. Re-engineer and Transform Business Processes

Remember that LMS vendors build their products to meet generic training needs based on requirements gathered from vertical and horizontal industry cross sections.

Re-engineering and transforming business processes to leverage the complexities of the LMS doesn’t mean compromising the needs of the learning audience or making the processes less personal. In fact,

avoiding customization of the LMS can result in more money to invest in people, processes or portals that actually enhance the system's relevance to the enterprise.

6. Centralize LMS Administration to Improve Business Results

It is true that learning departments (there may be multiple within a single enterprise) need to reflect the functional organization or business units they support. So the training needs of and approaches a sales group takes might be very different from those of an engineering department.

When you compare and contrast this to the needs of the HR training group that touches the entire employee base, you can easily see why specific departments might completely differ in their approaches, metrics and processes. All of this fully supports a popular belief and practice that learning departments should stay decentralized.

But, when it comes to the proper use of learning technology, this kind of decentralization can lead to a host of problems that can only be fixed by separate budgets and duplicate costs to the enterprise. It can frustrate learners who have to look in many places to find the content they need, and it can be internally dysfunctional for the different groups that are trying to conduct learning. In addition, decentralization can confuse waste time and create needless inefficiencies.

The key here is to centralize LMS administration services - not content creation - and dedicate administrators to LMS tasks on a full time basis. In the case of organizations that do not want to invest in full time administrators, it makes sense to outsource those tasks and reassign headcount to more strategic roles in the organization.

Technology Selection: Creating an Asset Instead of an Allocation

In light of all these issues, many companies find themselves in a bit of a quandary when faced with selecting an LMS for their enterprise training efforts. There are so many "shapes" and "sizes" of available systems (74 at last count); making the choice can be daunting. The answer to this problem, however, is relatively straightforward: every learning organization must take into account its own particular profile, needs, objectives, resources and budget.

- Do I need a vertical solution? Am I really serving one specific audience (or should I be) with a narrow, specifically-tasks "vertical" solution? One example might be an insurance company with thousands of independent agents needing a different solution than the employee base that serves them. Maybe one division of a large company is required by law (Homeland Security, SEC, Nuclear Regulatory or others) to keep and track records differently for different types of employees.
- Are my needs global and distributed or limited to a small organization? If your user population is spread across the globe and includes many remote team members, your technology needs will be quite different than if you are serving a smaller, self-contained group. And is it really *global* - not just worldwide? The difference involves providing support for language, double-byte display, easily-altered local "skins"/interfaces (including color, or colour) changes, to name only a few. Planning ahead in this area is also critical. Will a group that is now in just one geographic area expand to be a global group later? How soon? Buying "bigger" for the future is great for the vendor, but if it's 3 or 5 years away, you might be over spending (not just being "far-sighted").
- Am I consolidating multiple LMS?
- Does my organization have a strong IT infrastructure?
- Do I have the budget for extensive, long-term IT support?
- Should I choose a licensed product or move toward a software as a service (SAAS) solution?
- What is the 5-year roadmap for my LMS?
- How sophisticated are my learning business processes?
- How diversified are my learning organizations and how diversified are their needs?

This kind of self-examination and understanding will invariably help to whittle down the choices, eliminating LMS that don't fit your parameters.

At this point, it becomes much easier to select an LMS that has the most appropriate features and usability, given the specific needs of the organization. And if the learning leader is still having difficulties making the right LMS choice, partnering with an expert with years of experience in working with a variety of LMS can go a long way toward making a better decision. After all, turning learning technology into a valuable asset can have a profound effect, not only on the training function, but on the entire enterprise.

For CLOs everywhere, proper technology selection, usage and understanding is the key to knowing and proving that they are the impacting an enterprise that can learn the most, the fastest and the best.

For Tom Kelly's Bio and PodCasts, please visit page 19.

Chapter 12: Transforming the Role – Building Hot Skills and Mission Critical Capabilities

By Donnee Ramelli

“I cannot teach anybody anything. I can only make them think.” - *Socrates*

Move from managing training to growing competitive talent and hot skills.

While we always talk about aligning training with business needs, the real CLO masters are partnered with operational leaders that know what capabilities they need now and in the future. Sometimes this is clear; sometimes not. If you look at key performance issues or what skills top talent possesses, you may find the clues to solving the puzzle.

For example, at AlliedSignal, once we realized we were losing over a billion dollars in hidden defects and rework, Six Sigma was viewed as the mission-critical skill we had to ramp up. We trained and coached 300 black belts in the first year. The result was over \$200 million in savings year 1, which kept growing for the next 5 years.

IBM’s dramatic change from hardware producer to IT Consulting Services provider was the first time I heard about hot skills and how to build them on the run: the quicker IBM built and delivered these skills that were in high demand by their consulting clients, the quicker their revenues, profits and stock prices zoomed up. Such efforts require a real partnership between business, HR and Learning Leaders.

CLOs should build partnerships to identify/deliver “Hot Skills”.

Learn what is mission-critical for delivering value to customers and the enterprise. This means that CLOs have to know the business and partner with those leaders that have the right strategic, market and operational perspectives. Get close to the front lines and discover what causes problems and what really drives success/performance. Sometimes, the difference is near the customer or deep in the operation or product development process. The key is to find it and fix it on a pilot basis. Take a hard, candid look at what worked and what didn’t. Keep what works and standardize those best practices and performance through quick, focused training. Our first Six Sigma class had over 30 projects. In the last session of that first class, all the black belts and the 10 business leaders they represented knew what worked and what didn’t, both in a technical and organizational support sense. The businesses that came up short with low yields and weak savings on their projects quickly learned how to leverage the tools and their organizations to get quick, meaningful gains – and to catch up.

CLOs should utilize quick, results-focused action learning and be willing to make successes and failures visible to business leadership: real learning needs to examine failure and success modes.

Find the key leverage or talent value points to inject benchmark capability/skills. To leverage learning for the business, we need to build a deep understanding of how it works, creates value and wins customers. Specifically, where are the talent value points in the value chain of the enterprise?

Before the year 2000, GM had 27 different software platforms for engineers to design auto parts, sub assemblies and entire vehicles. GM knew if it could get to one platform, the cost savings would be substantial. More importantly, common parts could be used across vehicle models during initial design, saving a ton on tooling and vendor costs.

The cost of training 10,000 engineers for the new system was going to run a couple of hundred million dollars. GM decided to bring the training in-house and assembled a training team of its own design engineers to teach the new system to fellow engineers. While that effort was successful, it also resulted in much more valuable change: rather than numerous engineering handoffs, they mastered going from “art to part”. Then, they built a complete display of the most competitive engineering approaches used in the industry to make visible the competitors’ best practices and breakthroughs. If you examine the productivity equation at GM, a large part was driven by engineering productivity and reducing parts cost. Mastering this talent value point and leveraging it into common lower cost parts was a significant element of GM’s turnaround strategy.

CLOs must move learning into a partnership role with the business, operating units and HR; then, focus on finding, extracting and leveraging the value of key talent points to drive results. Focus on what the job, process and product performance is - and what it must be to be the best - and then move quickly to discover and standardize best practices and hot skills.

Master rapid, elegantly simple design principles in learning (lean, focused, quick, easy-to-deliver, easy-to-deploy and leverage).

Stay away from intellectually-complex academic approaches. A couple of times in my career I have seen organizations spend a ton of money on very sophisticated and complicated approaches that fall short of moving talent or teams to meaningful change or results. The reasons these fail are clear: the design should start with the outcome in mind, such as a “how-to” course focused on getting results, targeting the specific work processes, tasks, deliverables or analysis that will help the student drive successful results. It should be “how-to” training: not conceptual education.

For example, in GM engineering training, we focused on how to make engineers successful in building a detailed part design with full specifications from rough art work – “from art to part” – and how to integrate the part design into the system/vehicle design.

At AlliedSignal, we focused on helping black belts apply the Six Sigma DMAIC (Design, Measure, Analyze, Improve, Control) process with tools and techniques to optimize production processes in chemical, automotive and aerospace manufacturing. Later, when we understood that manufacturing was limited by process and product design, we moved to helping design engineers apply appropriate Six Sigma tools and techniques to their design processes.

Elegantly simple training design like Six Sigma DMAIC allows the student to understand and tailor their learning for the unique aspects of their application. The same training provided a robust, adaptable yet simple approach to optimization in over 30 different production facilities. We already had smart, talented engineers. Now they were armed with world-class tools and techniques that made a huge difference in manufacturing efficiency, quality and profitability.

Rapid design and piloting allows you to quickly learn what works, what doesn’t [work] and to uncover hidden treasure in the process, like realizing we could add Six Sigma design principles to the GM engineering software to guide us to more perfect designs right from the start.

Easy-to-deliver and deploy is all about being lean: no waste and focus only on the valuable aspects of the training. We are generally training very smart talent. Don’t waste their time. Allow them to work on real problems or projects with the tools and techniques you design, because adults learn by doing, not by lecture.

The other key is using technology to leverage key learning for other parts of the organization. Much of the basic Six Sigma learning is now available through e-Learning, allowing everyone to get the fundamentals and begin applying solid tools for improving processes. If we had those e-Learning modules in 1994, we would have had a quicker path to full awareness and deployment by Six Sigma team members. Only black belts and green belts got training back then – not team members.

CLOs and their learning professionals must master the right design principles for their business and their talent. They should develop expertise around design and delivery while mastering technology that can be leveraged and exploited to drive rapid deployment for the enterprise. Your learning team should embrace and experiment with “Do It Yourself” rapid design, with less than perfect pilots to test effectiveness.

CLOs and YouTube.

The success of YouTube tells me that we should drop our desire to only have long production-quality videos that require video streaming, which most of us don't have bandwidth for anyway. YouTube proves that short, lower quality videos are a hit with our newer talent; they would rather get valuable learning fast, first and fresh.

“Never doubt that a small group of thoughtful committed people can change the world; indeed it is the only thing that ever has.” - *Margaret Meade*

For Donnee Ramelli's Bio and PodCasts, please visit page 30.

Chapter 13: Set the Direction of the Future – Fast, Learner-Centric, Hot Skills-Focused

By Donnee Ramelli

Live as if you were to die tomorrow. Learn as if you were to live forever. – *Gandhi*

The future will be like:

- a) a rollercoaster
- b) whitewater rafting
- c) Niagara Falls in a barrel...

Global competition and surging technology will cause it to look like “all of the above”.

First, do the math. Next, hang on!!

By 2010, there will be 8 billion people, 4 billion cell phones, 2 billion computers, 1 billion hosting websites, 40 million robots and our global knowledge will double every year. Eight out of ten U.S. workers will be employed in knowledge industries that will require massive technology to stay competitive globally. Learning the latest competitive hot skills, mostly through your “device”, is the only way to protect your professional career. Fast learning focused on performance and capability will be the greatest demand.

Think like the CEO: build a clear understanding of the current enterprise, the industry environment and your company’s human capital strategy.

The traditional SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis can work, but I would concentrate on what the core competencies, competitive skill sets and value-creating work will be for the future business. Focus on where talent will come from – recruiting, retraining and/or off-shoring. Try to understand the broader industry trends and pick the 3 most likely scenarios for your business/industry; brainstorm learning strategies for all three. Every time I have done this, a learning strategy focused on being quick, agile and effective at rapidly building emerging hot skills and transferring best practices works for all 3 scenarios. It doesn’t matter that learning may begin to look more like “YouTube”, where training content is bundled with job aids, cool tools and an expert call center, rather than a traditional 2-day course on some new concept or application.

Master the New Mix: give up your vision of University classroom training and of becoming “Mr. Chips” (Hint - Google this character if you are under 45).

Focus on three game-changing trends or wrinkles in the future (two new generations, increasing in global talent and the surge in amazing technology). If you can master this new mix, you will be a rock star in learning and talent development. You need to exploit technology and appeal to the new talent pool, which grew up on technology and loves new hot tools. Direct your own and your team’s thinking to enable quick, agile and effective “chunk” training – check lists, job aids, quick learning – with technology. Add in more “no frills, do-it-yourself” design and delivery, and build your own agile, responsive means of production and sustainability.

Today, think LMS, Learning Portal, e-Learning, WebEx, WebCasts and IM Mentors. Tomorrow, think eCampus, iPods-iPhone-iLearn and Hi-Tech devices we don’t even have yet.

2010: You’re traveling abroad and project on your hotel wall - using your secure satellite “device” - a class or meeting and participate like you are there, all while sorting your email and dealing with IM (heck, maybe you even teach part of the class remotely about the latest competitive technique that this region you’re traveling through has just used to beat the competition). This scenario sounds like “beam

me up, Scotty” (Hint - Google this with *Star Trek*, the early years) or like you’re using spy gadget (“Bond, James Bond”).

My favorite future place: eCampus! Learner-centric, 24X7 learning, support and tools – with IM Mentor!

Focus on the self-directed learner and give that professional talent a powerful mix of learning, support and competitive tools. Self-directed learners are the right talent to recruit and retain because they are also self-directed performers that have initiative, smarts and drive for success.

Why eCampus got derailed: I always thought the internal websites for business units or functions in our corporations would become fountains of knowledge and learning for individual communities of practice. Somehow, that idea got high jacked by web masters who created boring lists of topics to click and click and click that only offered light news and commentary (weekly - not daily/hourly). Maybe getting good content is the issue, but wasn’t streaming video by leaders and SMEs going to solve that issue?

How I found my eCampus preview: At GM, the CIO had a core process for the development of software - SDP-21. His website had the best learning ever on a complex, yet mission-critical process! It documented the process, provided templates and examples for every deliverable and explained the purpose and approach for every step and decision point in the process. The CIO and his learning leader went on to tape a number of key executives explaining the new approaches as strategy changed. Employees felt like they were really learning directly from their leaders. While I can’t share that website, take a peek at a great public example of eCampus and “echunking” learning at MSNBC/MSN Money Center:

http://articles.moneycentral.msn.com/Investing/StockInvestingTrading/Technical_Analysis.aspx

This site has a cool set of a dozen 2-minute modules on how to understand and analyze stock trends using some pretty sophisticated tools. The expert presenter and the cool graphics and trend charts make this pretty great learning around a very difficult topic. It’s learner-centric: you can get as much detail as you want or just jump ahead to the advanced learning.

Focus on “Front Line Learning”, where the real battle is won.

Make learning a natural part of the work day. Get managers and leaders to teach in their conference rooms and in your classrooms. Technology can offer the quick learning that many professionals want, but managers and leaders need to build learning into meetings or “lunch and learns”, where tactical learning about successes, failures or new procedures is provided informally in a team environment.

The belief that all learning must come from classrooms in a corporate university is out of touch with how professionals really learn. Ninety percent of how adults learn and develop takes place in the midst of challenging assignments and with team members. They learn mostly on the job with colleagues and/or key experts with whom they connect.

Take time in your management and leadership development programs to stress the importance of leaders sponsoring learning right in the work area – front line learning – that gets us to think, reflect and change our approach. This provides the best source of skills development and capability; it’s 9X more powerful than formal training. Ensure that managers align and integrate their actions with performance management, goal setting, feedback and sponsoring development efforts focused on key priorities and operating results. Coaching on results is the best way to help develop and advance their teams.

Think about the old concepts of OJT (on-the-job training) and office training sessions done by local leaders. If you move those into this century, our smart young talent will develop best in the environment that really counts: their work environment. “LeadersTeach” is still the most powerful and efficient way to build real capability in the “front lines”.

CLO Checklist for the Future:

- Get ready, understand the trends in your industry and hang on!
- Think like the CEO, who knows the business direction and knows it's all about talent.
- Master the new mix of talent and technology. Build your eCampus and compete with YouTube.
- Focus on “front line learning” and getting leaders and managers to keep OJT effective; make “LeadersTeach” part of your brand.
- Create approaches that keep cadence with the enterprise and are effective, agile and lean.
- Explore new ideas, solutions, technologies, best practices, promising practices and even failures.
- Pilot, assess and refine approaches to learning so they are focused on helping learners achieve results.
- Publicize the results and market the value/availability so employees Google your eCampus.

Remember, talent is a competitive advantage...

...And fast learning can build sustainable competitive advantage and a world-class enterprise. The CLO's mission is to make effective, competitive advantage learning an operating reality and the heart beat of the learning team. We need to focus on driving valuable performance and result\$.

“Result\$ are our only credentials” – *Ramelli*

For Donnee Ramelli's Bio and PodCasts, please visit page 30.



The ReSkilling Imperative: A Global Challenge for Learning Leaders

By Elliott Masie

As you read the perspectives and experiences of our Learning Leader contributors to this Fieldbook, I would like you to add one more issue and challenge to your radar screen: ReSkilling.

Throughout the world, there are tens of millions of workers already in the workplace who will need to extend, update or totally overhaul their skills in order to stay employed. This need for ReSkilling is being driven by:

- Economic and Marketplace Disruptions
- Technological Impacts on Work
- The Rate of Change in Business
- Geographical Mismatch Between Jobs and Skilled Workers
- Global Competition for Jobs and Projects
- Reconsideration of Retirement: Return of Senior Workers to the Workplace

ReSkilling will be required for those who are currently employed in organizations where these seismic changes are threatening their continued employment. How do we train people for roles that will change two years from now while keeping them employed in their current roles?

ReSkilling will be required for laid-off employees. How can we rapidly retrain or recertify unemployed citizens in skills that are mapped to available and realistic job openings?

ReSkilling will even be required for many of our recent college and university graduates. Here in the United States, we are seeing a growing number of unemployable college graduates who do not have the skill sets needed in today's marketplace.

I am leading a major effort - ReSkilling America - that is hosting a dialogue with senior government leaders, business leaders and learning leaders on this critical challenge. We will need to think dramatically out of the box on how we accomplish massive and scalable ReSkilling.

Bluntly, we can't afford to send millions of learners back to the traditional classroom for ReSkilling. How do we harness e-Learning, Social Learning, Mentoring, Internships and Community Organizations to extend ReSkilling? How do we create a culture that accepts and supports the need for true lifelong and ongoing ReSkilling? And, how do we adapt current and emerging technologies and methodologies to support ReSkilling?

At Learning 2009 (Nov 8 to 11 in Orlando, Florida) we will host a major conference on ReSkilling. I invite Learning Leaders to join in this dialogue and project.

Yours in Learning,

A handwritten signature in blue ink that reads "Elliott Masie".

Elliott Masie's

LEARNING 2009

November 8 - 11 · Orlando, Florida

Keynote Speakers:



Captain "Sully" Sullenberger

Captain Chesley "Sully" Sullenberger III, the heroic pilot who masterfully landed US Airways Flight 1549 on the Hudson River and saved the lives of 155 people.



Betsy Myers

COO of the Obama Campaign and Co-Chair of ReSkilling, a special project to address the challenges of ReSkilling large segments of the population here in the United States (and globally).



Malcolm Gladwell

Author of *Outliers*, *Blink* and *The Tipping Point*, Malcolm will address the key issues of learning and the role of "outliers" in our organizational effectiveness.



Laura Fitton

Known as Pistachio in the Twitter world, Laura is a leading expert on the use of "microsharing" in organizations, including tools like Twitter for collaboration. She is also the author of the upcoming *Twitter for Dummies*.

www.learning2009.com

co-hosts: Elliott Masie's **LEARNING CONSORTIUM** 

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We are 252 organizations seeking a few new colleagues. We include the learning leaders of some of the largest companies in the world (e.g., Wal-Mart, JCPenney, British Airways, Wendy's International, Ericsson Inc. and American Express). Every day throughout the year, Learning CONSORTIUM members turn to each other and the staff of The MASIE Center for benchmarking, networking, research and collaborative projects in the Learning and Training field.

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Elliott Masie,
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