
It might seem old fashioned for a seasoned executive to invite a junior colleague for a chat about effective management techniques, but at Booz Allen Hamilton this type of mentoring is part of the acculturation process.

Taking on a protégé is part of the culture of corporate consulting firms, and Booz Allen is no exception. What was once considered an informal knowledge sharing method is now incorporated into a learning initiative known as Discover Booz Allen.

A two-day acculturation session that kicks off a yearlong immersion process, Discover Booz Allen is led by senior executives and is aimed at reducing short-term attrition. It includes personal narratives from senior leaders about the organization. At the conclusion of the initial program, each new hire receives more stories in the form of an "advice" CD-ROM.

In the past year, the company realigned its learning organization and established new best practices to manage the learning development. The innovations were intended to promote tighter integration and more holistic solutions, according to Aimee George-Leary, Booz Allen's acting director of learning and development.

Booz Allen employs 18,000 people, conducts business in 36 countries, and is experiencing 12 percent annual growth. The greatest challenges identified by the learning organization include leveraging training and development globally, embedding learning, and integrating services to provide comprehensive and diverse performance management solutions.

"Learning and development people are artists who create unique solutions. Our opportunity is to manage that art effectively," says Vince Gon-

Holistic Approach to Learning

zalez, senior manager for learning and development.

Talent development

The learning organization fostered relationships between employees and managers by putting greater emphasis on mentoring and coaching. Booz Allen's development strategy places the greatest emphasis where most learning occurs: on the job. The role of a manager changed from utilizing talent to developing talent, and managers are expected to mentor employees on a wide range of topics. Mentors are assigned to staff from different backgrounds and utilize storytelling methods to share the company's history.

"An understanding of the corporate culture and how it integrates into every aspect of how we do business is critical to an employee's success," says Gonzalez.

Mentoring also is conducted in group sessions through mentoring circles. Experienced staff members meet in groups with junior employees to share their insights on what it takes to succeed. Mentors are required to meet specific criteria in terms of experience, and they must

be able to commit time to the program, which includes a required orientation and six two-hour sessions.

George-Leary and Gonzalez emphasize that this new culture has adapted since the hard-charging days of the 1990s. The organization embraces work-life balance, and has even hired a full-time work-life coordinator.

"The success of our client engagements is because they are built on a solid foundation of long-term relationships and an understanding of industry and client needs," Gonzalez says. "We apply those same fundamentals to our staff and the development programs we design for them."

Strategic development

Currently, the 84-member learning and development staff is managing 16 strategic development projects with a dozen more in the pipeline.

"We have doubled the number of initiatives we can manage, due to scaling and standardization," George-Leary says. "There is less duplication, and we can share and measure what we do. The new methodology marries project man-

Consulting firm incorporates company culture into on-the-job training initiatives.

"There is a much greater focus on institutional knowledge, functional skill areas, and career development. We have really taken our service offerings to the next level."

—Aimee George-Leary
Acting director of learning and development

agement with design and delivery, resulting in a process we can walk internal clients through.”

Projects are initiated in several ways. At the highest level, strategic needs are determined by the board of directors and an executive council in accordance with the business plan, as well as in response to the organization’s requirements. External factors such as competition, turnover, and overall economic outlook also play an important role in inspiring learning initiatives.

Booz Allen’s people model represents the strategy, processes, and systems that support development throughout the employee lifecycle. It is set by the people services leadership team, which then charges the learning organization to develop and deliver aligned learning initiatives. A biennial survey yields critical information for these programs and includes feedback from employees at all levels. This feedback is then incorporated into the learning and development initiatives, and the learning organization adapts to meet the needs of clients.

Once the survey raises an issue, an improvement task force attaches priorities to each issue, designs solutions, and introduces improvements that concentrate on the key areas of work-life balance, real-time feedback, professional development, and front-line leadership. For example, front-line managers recently expressed the need for more targeted functionality in the LMS. Learning and development staff responded by creating a separate executive segment that contains leadership resources, such as direct links to Harvard ManageMentor and access to summaries of current business books.

Career planning

Another successful initiative is Booz Allen’s career mobility program. It was created to address turnover among employees who were interested in seeking new professional experiences. The program permits them to explore and interview confidentially for new developmental opportunities within the organization.

The learning staff refocuses the learning needs of program participants to leverage the development framework and align them to functional programs supporting new skills. Since its inception, more than 2,000 employees, many of them high performers, have transferred to new positions, and voluntary turnover has dropped as a result.

Annual employee evaluations gauge progress against targeted competencies—an important element to determine learning and development needs. The results of those individual needs assessments spur the creation of personal development plans, which outline the necessary individual and group development activities required for employees to succeed.

Core competencies are tied to Booz Allen’s four career development models, which are tied to business strategy and goals based upon job and functional area. The models leverage employee development frameworks, which spell out success factors, career obstacles, and expectations as well as formal development opportunities.

The organization realigned the instructional development group to focus on building competencies consistent with market strategy. The group formalized its processes by evolving the ADDIE model to in-

clude components of formal project management processes for the execution of its initiatives. Finally, a project office was created to standardize practices and operations that would ensure consistent, repeatable processes.

“There is a much greater focus on institutional knowledge, functional skill areas, and career development,” George-Leary says. “We have really taken our service offerings to the next level.”

In order to achieve standardization, the project office staff developed a custom learning development project management methodology that blends the best practices of project management and instructional systems design. The team focused on identifying strengths and weaknesses in project management processes, establishing a project management capability baseline, setting up a continuous improvement program, and integrating effective project management principles.

A study was conducted to understand operations and staff alignment in order to map the project management method to the existing environment.

“We partnered with our internal process improvement team, which helped us create a direct link to other aspects of the business,” George-Leary says.

The project management tool is available on Booz Allen’s collaborative intranet site called “TeamShare.” It includes information, processes, templates, and examples that encompass core elements of learning development, including intake management, budget and schedule management, project sourcing, media analysis, and rapid development.

AMERICAN EXPRESS TRAVEL SERVICES

**—Suzi Dunford
Director of reporting
and analytics**

Heal Thyself

Adhering to the “heal thyself” motto, the American Express Learning Network took a hard look at its own practices last year. Faced with escalating demands from its internal customers as well as the need to better educate its own staff, team members took steps to improve performance and create new vision and mission statements.

Suzi Dunford, director of reporting and analytics, has spent the last three-and-a-half years with American Express’s learning organization. Upon her arrival, she found “an organization striving to provide learning services. Requirements were changing, especially with new technologies. It was becoming a different learning environment.”

Seven learning network directors, aligned with the lines of business, supervise 300 learning and development professionals who provide training services to thousands of frontline American Express service representatives worldwide.

“We asked ourselves, ‘Do we have all of the right skills internally?’” Dunford says. “We realized that we needed to provide more learning opportunities for our own staff. We really wanted to retain our talented people, and those people jumped at the opportunity to self-improve.”

In addition, the knowledge and skill requirements for learning professionals in the learning network had changed.

“Typically, our instructors had come from the service floor, but being a good

phone representative doesn’t necessarily make someone a good classroom facilitator,” Dunford explains. “We wanted people with specific education and adult learning backgrounds. We wanted to walk the talk.”

Department makeover

The learning network had been so focused on the learning and development of others that its members had not devoted enough attention to their own knowledge and skills development. To address this crucial issue, the team took several steps. A manager of employee development was hired and charged with improving the skills and knowledge of the learning staff.

The organization implemented “learning tracks,” a tool created and developed in-house and based on ASTD’s competency model. It includes a set of college-like classes that employees can enter at any level, based on their current skill set.

The number of employee certifications from professional organizations increased. On a broader scale, the organization renewed its commitment to the learning profession by joining several industry organizations.

The department also tackled the issue of compensation. “We regularly review our compensation practices to ensure that we are in line with the company’s ‘pay for performance’ philosophy, and that we are rewarding our top per-

Learning network concentrates on its own learning and development.

“We realized that we needed to provide more and better learning opportunities for our own staff. We really wanted to retain our talented people, and those people jumped at the opportunity to self-improve.”

–Suzi Dunford

Director of reporting and analytics

formers appropriately," Dunford says. "A variety of enhancements to our compensation program last year resulted in increased engagement and decreased attrition within the department."

The numbers bear witness to Dunford's assertion. External voluntary attrition dropped after the initiatives were implemented.

Measurement is a high priority within the learning network, which employs a team of six business and financial analysts whose sole responsibility is to collect, analyze, and report training metrics. Results from training activities are stored in many areas, including the learning platform itself, databases maintained by the learning network staff, databases managed by the outside business partner, a customer satisfaction platform, and a financial database.

The metrics team consolidates all data into multiple databases, matches unique learner identifiers from the various platforms, and produces several types of reports.

As the learning network began to deliver even more data to its business partners, the need for more detailed and timely reporting arose. Therefore, the technology team developed metrics central, a web-enabled tool that can be accessed by business partners as well as learning network employees. The tool allows a user to view initiative results, including assessment scores, completion rates, completion times, and incorrect answers.

Classroom modernization

In assessing its operation, the learning team also took a hard look at the physical training environments at American Express.

"The classroom facilities at all of our major service centers were in need of remodeling," Dunford says.

One of Dunford's training colleagues in Phoenix was inspired by an ASTD Benchmarking Forum meeting at Steelcase University in 2005. He discovered many best practices he could apply to the Phoenix facility that are now being replicated at other learning centers across the country.

The more innovative ideas included a keener focus on wall space and greater use of interactive technology. Instructors, learners, and customers were included in the process as their opinions were sought on such details as lighting and whiteboard placement, paint colors, procedure development, and the new maintenance policy that places shared responsibility for the upkeep of the new spaces among all users.

The new space features increased seat capacity, additional gathering spaces, and more appealing colors. State-of-the-art interactive technology includes a touch-panel room reservation tool, a sophisticated PC image that supports multiple businesses, and a notepad-style instructor monitor.

In addition, a historical timeline art gallery was installed along the corridors. The gallery features pictures and captions of major events in the history of American Express and concludes with a panel where employees sign their names to symbolize a commitment to the company and its corporate culture. The signing event occurs after the successful completion of new hire training.

Again, the results of the transformation are considerable. Room occupancy levels are at their highest ever, and learners are more inspired. Just as important, the learning department is re-energized.

"The whole department is now engaged and motivated to support our world-class brand," Dunford says. "It has been very uplifting."



—Brian Hammond
Learning center manager

Consistent Learning Initiatives

Healthcare system creates centralized learning approach.

Photo by Scott Ferguson

The ratio of corporate training staff to total employees at Ascension Health, a not-for-profit health system, is 1:100,000. It comprises 29 hospital systems (63 hospital facilities) in 20 states.

So how does Ascension Health's Learning Center Manager Brian Hammond do it? By combining a decentralized model with savvy outsourcing, Hammond is able to guide a variety of learning initiatives that range from clinical education to office systems and from leadership development to mandated accreditation activities.

Ascension Health was formed in 1999 through a merger of several Catholic health organizations, including those sponsored by four provinces of the Daughters of Charity and the Sisters of St. Joseph of Nazareth. In a nod to its religious roots, local hospital systems are referred to as "health ministries."

Hammond, a supply-chain specialist who pioneered an Internet-based procurement system, received a mandate in 2003 to determine whether a centralized learning center approach made sense for Ascension Health, to invite all the health ministries to participate in the initiative, and to launch the learning center.

"The learning center was envisioned to take an enterprisewide perspective, to create economies of scale, to ensure consistency, to identify best practices and programs, and to facilitate communication between learning and development people at each ministry," Hammond explains.

One voice

Consolidating learning efforts was necessary in an environment that contained a lot of redundancy.

When the Health Insurance Portability and Accountability Act (HIPAA) was introduced, each of the 29 health ministries created and deployed their own employee learning programs. Typically, each hospital within a ministry developed independent learning materials and programs to communicate the same required information.

The new structure facilitates the sharing of learning resources for common priorities such as HIPAA or the annual educational needs assessment mandated by the Joint Commission on Accreditation of Healthcare Organizations, which must be conducted by each facility. Rather than develop 29 different surveys, one ministry's survey was identified as a model. It was updated using a more formal assessment methodology and issued to all of the health ministries in the system.

There are advantages to the decentralized model, Hammond says. One of the most prominent is that it is in harmony with the culture.

"Healthcare is a national need, but it's delivered locally. Each ministry has its own character," he says.

There are other advantages, too. "Because most learning is delivered at the local level, we are able to do baseline assessments and measurements of each target population, and we are able to customize," Hammond says. "As a result, I think we have much better employee buy-in and participation than we would if everything were handed down from the system level."

Learning advisory teams

Hammond acts as a facilitator rather than a dictator of strategic learning initiatives. Learning advisory teams, composed of personnel from the different health ministries,

are responsible for identifying learning needs, creating performance objectives, and identifying programs. The teams are aligned to seven development categories, such as information technology and leadership.

The seven categories also constitute the core areas addressed by Ascension Health's learning management system (LMS). Individual health ministries can add their own content to the LMS within the seven categories.

If a learning advisory team devises an enterprisewide education project, such as a 2005 clinical skills initiative targeted at improving healthcare safety, the team takes the suggestion to the operations committee. The committee collects priorities from all of the advisory teams and develops an annual plan based on scope, schedule, and budget constraints.

Educational requests are approved if they meet the strategic goals of the organization. Enterprisewide initiatives are referred to

"Communication and adoption of the new protocols was a challenge due to the diversity, size, and scope of the clinical environments. Successful implementation and the spread of best practices require that all clinicians, not just our employees, adopt the new standards."

—Brian Hammond
Learning center manager

the shared learning council, which includes the chief learning officer for each ministry, plus key system office stakeholders. The group meets quarterly.

"This structure has demonstrated the flexibility to support dynamic business needs and improved communication across the enterprise," Hammond says. "That communication has helped to significantly reduce the redundancy of learning processes and events."

Dramatic results

Ascension Health leveraged the clinical healthcare safety initiative across the system and was able to broaden the impact of learning to support business objectives. Safety had long been a priority for the organization, which pledged in 2003 to have "no preventable injuries or deaths by the end of fiscal year 2008."

After an initial needs assessment, eight "priorities for action" were defined. Each priority was adopted by two "alpha" health ministries for the research needed to improve new protocols. Learning professionals at each alpha site were then responsible for training the clinicians and employees at their facility on the new protocols.

"Communication and adoption of the new protocols was a challenge due to the diversity, size, and scope of the clinical environments. Successful implementation and the spread of best practices require that all clinicians, not just our employees, adopt the new standards," Hammond explains.

The corporate learning office played a crucial role in lending legitimacy to the initiative with these activities. It created a specialized

portal within the corporate intranet, developed online educational modules and learning plans, created affinity groups to share best practices, developed systemwide reporting metrics, and used LISTSERVs to facilitate communication.

The results of the clinical safety initiative at the alpha sites have been dramatic. Mortality rates declined 22 percent at one location. Falls and related injuries dropped nearly 50 percent at another, and pressure ulcers were reduced to less than 1 percent, which is one-fifth of the national average. In the past year, the learning initiative has been rolled out as a corporate program for all health ministries.

Culture appreciation

Ascension Health's unique beginnings were the impetus for another innovative learning initiative. As the organization has grown over the past five years, many of the leaders who joined the organization are laypeople, replacing the religious sisters who led the health ministries in the past. Yet, an understanding of the organization's religious history is critical to acquiring a true appreciation of its culture.

"With the increase in lay leadership, our sponsoring organizations want to maintain the culture of Catholic healthcare," Hammond says.

Further, there is a belief that greater ethical discernment leads to better critical decision making.

Leadership development in its previous incarnation at Ascension Health was classroom based and accommodated only 25 leaders per year. Needing to address a larger population, the ongoing executive formation program was launched in

April. With capacity for 1,000 leaders, the initiative accommodates different learning styles and preferences as well as busy executive schedules. Its content is focused on six behavioral expectations:

- describing the healthcare system as a ministry of the church
- developing a leadership style based on service
- applying Ascension Health's integral model of spirituality
- facilitating prayer and reflection
- actualizing Catholic teaching
- maintaining the organization's ethical standards.

The curriculum includes six new instructor-led courses, seven new e-learning courses, spiritual retreats, and reflective reading. At the outset, executives complete an online self-assessment linked with the six behavioral expectations. Based on those results as well as workplace feedback, they then review an online catalog of resources and select a formation goal for the upcoming year with their CEO. They are encouraged to experience the formation activities in groups to facilitate behavior change within a community of peers.

Hammond hopes to see more leader participation in training.

"We are a relatively young organization and have focused on getting it off the ground," he explains, noting that Ascension Health recently hired its first vice president for learning and organizational development.

"We are in the beginning steps of developing a systemwide learning and development effort," he says. "The process has developed the foundations and support of individual health ministries. We are very pleased and proud to receive a 2006 BEST Award."

Photo by Guru Dutt

—Krishnaswamy Ramkumar
Head of human resources

Becoming a Global Player

Bank develops complex learning program for tens of thousands of employees.

Chief among the challenges facing the learning and development function at ICICI Bank in Mumbai, India, is the sheer size of the organization. The bank has grown exponentially—from 5,000 employees just five years ago to more than 28,000 in 2006.

At the same time, ICICI has expanded its operations outside India to 13 international locations. Learning and development opportunities are also offered to contractors, who number in the tens of thousands.

“As the company has grown, the complexity of our operation has tripled, if not quadrupled,” says Krishnaswamy Ramkumar, the bank’s head of human resources. “Our operation has morphed from an administrator of training to design, delivery, and the continual creation of structures and products to help us meet those complex requirements.”

Training and development is now a line of business within the bank, which pursues aggressive outsourcing in many of its other operations. Had the strategic decision not been made to develop learning and development as an internal service and competency, Ramkumar says it would have been outsourced at a prohibitive cost. Even so, the training

and development operation employs only 12 full-time staff, a ratio of more than 2,300:1.

Future investment

To meet the learning needs of its audience, ICICI Bank pursues a decentralized model that relies heavily on strategic partnerships, master trainers within the organization, trusted subcontractors, distance learning technology, trainer and independent learning, and mass training sessions that are aggressively promoted.

Through such efforts, the bank not only helps to support the phenomenal growth of its operations, but it also gives rise to an entirely new class of highly trained professionals who are essential for expanding the nation’s economy.

A key strategy of the learning and development operation is reaching learners before they become employees. To achieve this goal, the bank has partnered with colleges and universities nationally to provide research and curriculum development services for banking courses. ICICI Bank provides education, curriculum, and even e-learning modules free of cost.

When wealth management became a major segment in recent years, ICICI Bank discovered that it

needed more finance professionals with sound relationship management skills who were not otherwise available in the wider workforce. The bank invited business school faculty to a week-long training program in financial services in the consumer-banking domain. Upon completion of the program, a group exercise helped develop a curriculum for MBA students. In the past year, more than 1,000 students at 27 business schools have taken the wealth management course, and more than 200 of the students became ICICI Bank employees.

“The single greatest challenge is for the bank to be a global player. We want to be in the top five in Asia within three years. Learning and development must help to realize that vision.”

—Krishnaswamy Ramkumar
Head of human resources

The strategy is based upon a belief in the promise of India's next generation. Nurturing talent is a long-term goal. The average age of an ICICI Bank employee is 27 years, and the average age of a mid-level manager is 33 years. All new hires at the bank have an undergraduate degree, but few had any exposure to banking.

"The bank prefers to act as a finishing school, providing its own industry training rather than paying for the finished product," Ramkumar says. "We invest heavily in young people, striving to create not only good employees but good leaders."

Innovation is another valued competency that is linked with speed to market, which the bank views as a true differentiator.

"It's no good to have a great idea if you can't convert it to a commercial product and get it to market quickly. Effectively managing innovation projects is a key competency for us," Ramkumar says. To achieve this, the bank invested heavily in training for more than 1,100 line managers to serve as master trainers. Each trainer must commit to spending at least 10 days per year in the classroom. They assist with such programs as product and process training, and imparting core relationship management, customer service, and selling skills.

Mentoring program

The most critical of the business growth leadership initiatives, devised to create a leadership pipeline ready to spearhead new and expanding lines of business, is the ICICI Bank Leadership Mentoring Program. The program, built upon the action-consequence model, incorporates 360-degree feedback, behavioral labs, and group mentoring by

top bank executives. A total of 1,300 high-potential employees, including all country heads, business heads, and functional heads, have participated in the program.

A select group of independent training professionals also work as trainers. They must attend a course, apprentice with a master trainer, and receive positive student evaluations before they can teach alone. They also receive extensive coaching on corporate culture. In 2005 and 2006, 44 external trainers conducted 1,000 programs that have reached an estimated 20,000 bank employees.

To reach large numbers of trainees at diverse locations while still providing a coordinated learning experience, ICICI Bank has invested heavily in virtual classroom technology. Through this medium, one trainer can reach 400 employees at once.

As the learning and development function seeks to utilize human resources judiciously, it will develop more courses that are less dependent upon trained facilitators. For example, training for new branch employees covers bank products and processes, and attempts to develop nine unique skills. Delivery mechanisms included process videos, do-it-yourself exercises with simulated data, and e-learning modules. Tracking and reporting software monitors each participant's proficiency levels across skills as they move from learner to expert.

Sales training

ICICI Bank took a page from the World Health Organization and UNICEF as it pondered how to provide sales training to 40,000-plus commissioned sales personnel. Whereas previous delivery methods

had leveraged master trainers to reach 8,000 participants per year, the goal for 2005-2006 was to reach a much higher proportion of this workforce, which has a high attrition of almost 50 percent.

Emulating the tactics employed by the health agencies, ICICI Bank hosted a massive one-day event in September 2005.

Supported by the efforts of 8,000 agency managers, the bank conducted a week-long campaign blitz to advertise the training and its benefits. On the appointed Sunday, the training program was offered at 600 sites in 255 cities and towns. An estimated 26,000 participants attended. The process was repeated each month so that 20,000 additional participants were trained by March 2006.

Although the bank offers training in English in all 13 countries where it conducts business, plans call for a multinational training group.

"The single greatest challenge is for the bank to be a global player," Ramkumar says. "We want to be in the top five in Asia within three years. Learning and development must help to realize that vision. We need to figure out how we convert learning in English in the right spirit for other countries and how to build a global ethos while respecting local culture."

As a trained psychologist, training course designer, and facilitator for last 22 years, Ramkumar plans to meet this challenge with same passion and drive that has helped him and his team so far as they go about this and all other challenges.

"Ours is a highly passion-driven function, and learning and development professionals should have a passion for learning," he says.

Striving for Safety Excellence

Airline uses simulators to prep for disasters.

“We can control interactions with our customers through culture, climate, and technology, but the company must change its levels of development and communication. It is a frustrating, challenging, and energizing time.”

—Mike Barger
Vice president and CLO

Learning and development has always been important at JetBlue—the bold new airline that flew its first segment 18 months before 9/11 and now hires 6.5 new employees daily.

The airline opened its corporate university at the same time. Employee training continues to drive the paradigm shift that has always been JetBlue’s stated goal.

Mike Barger, vice president and chief learning officer of JetBlue University, is a former Navy pilot, and he still flies JetBlue aircraft. Barger admits that the training he administers at JetBlue has a “military feel” to it. However, the corporate culture Barger supports is anything but militaristic.

“Employees are encouraged to do the right thing,” he explains. “There is no ‘Thou shall not’ manual.” What he does take from his military training is a keen focus on end results.

“We try to understand how to structure learning with the end re-

sult in mind. We set our objectives first then build backwards,” he says.

Great doers

One of the objectives in the past year was to address the results of an employee survey that showed a lack of confidence in leadership. JetBlue had made the classic mistake of many ambitious, fast-growing companies: It promoted many qualified frontline employees to leadership positions without providing them with the tools and training they needed to succeed in their new roles.

“We identified great ‘doers,’ but didn’t give them a lot of tools, and they found themselves struggling within 18 to 24 months,” Barger explains.

Learning interventions are managed by JetBlue University through five colleges, one for each discipline: pilots, flight attendants, maintenance, gate staff, and reservations. Two support teams, learning and development and learning technologies, work together through the classic ADDIE model to design and

deliver training. Much of that training is classroom-based, and it takes place at one of five campuses in New York, Orlando, Salt Lake City, Boston, and Long Beach, California.

The training devised for new frontline leaders had a much wider impact on the entire staff than the nearly 800 people who attended. Before commencing the training, Barger and his staff conducted extensive interviews with C-level executives and all corporate officers to identify JetBlue's principles of leadership. Those precepts became the foundation of the company's culture and, Barger believes, a key to its success. The principles include to treat your people right, do the right thing, communicate with your team, encourage initiative and innovation, and inspire greatness in others.

The 800 participants attended more than 14,000 hours of leadership development training in 2005. One of the keys to the training is participation by people at the highest levels of the company: Jet Blue's CEO and president facilitate the entire first day of "principles of leadership foundations" and all 16 officers participate.

"This is our mechanism for keeping a small community," Barger says. "We can't reach all the employees any more, but we can reach all the leaders."

Simulator training

Airline passengers might be surprised by the fact that a pilot's first flight in new aircraft takes place with passengers aboard because all of his previous training occurred in a simulator. In the case of JetBlue's brand-new Embraer 190s from Brazil, the corporate university was involved from the earliest stages in

"Every employee at our company has been exposed to some offering created and distributed by our learning function in preparation for the launch of the new aircraft. "

–Mike Barger
Vice president and CLO

designing training that affected every employee in the company.

Not only was the 100-seat, South American-built aircraft new to JetBlue, but it was new to the industry. As a result, no training materials of any kind existed. Therefore, the design and development of training devices and course materials was conducted simultaneously with the design and production of the airplane. Plus, the Brazilian location made effective and timely communication very difficult, even in today's global economy, according to Barger.

Corporate university staff filled key positions on the integration team and were charged with leading the change management process. The target audience for the learning projects was the company's entire employee base.

"The scope of learning requirements was immense," Barger says.

Partnerships were formed with every stakeholder group inside and outside the company, including the leaders of every operational department, the Federal Aviation Administration, the airplane manufacturer, component manufacturers, and simulator manufacturers. All training, including simulations and course materials, require FAA approval.

Needs assessments were conducted with each of the stakeholders to determine the specific

requirements of each team, and training plans were created. Over the next 12 months, the learning and development staff developed more than 370 hours of course content, most of it internally.

"Every employee at our company has been exposed to some offering created and distributed by our learning function in preparation for the launch of the new aircraft. Most employees have received at least eight hours of content," Barger says.

Heavily invested in the new aircraft, JetBlue built simulators of the cockpit for the pilots and another of the cabin for the flight attendants. The JetBlue University staff acted as the liaison between Embraer and the simulator manufacturer to translate and transfer all requirements because both of the simulators were constructed almost simultaneously.

The simulators, carrying a price tag of \$46 million, are the first of their kind ever produced, establishing a new standard in high-fidelity, high-resolution simulation. The simulators are displayed at JetBlue's newest corporate training facility in Orlando, which has become somewhat of a tourist attraction.

Safety training

Launching new aircraft provides an occasion to celebrate. But airlines

must spend a lot of their training time preparing for the worst.

"Our company operates in an industry where incidents and accidents are steeped in drama and receive a great deal of media attention," Barger says.

JetBlue received such attention in September 2005, when one of its aircraft experienced a nose gear problem shortly after takeoff from Burbank, California. Eerily, the event occurred just eight days after JetBlue University had conducted its first large-scale, realistic emergency response drill. The great success of that training was noted by David Neeleman, the airline's chairman and CEO, in the company's 2005 annual report:

"All of the training and dedication to safety excellence came together on that evening to produce a safe landing. We all collectively cheered in admiration for the heroic efforts of our crew members," he wrote.

In the future Barger hopes to link learning more closely to individual performance by creating individual development plans for all employees. Although JetBlue already uses an aggressive customer feedback program as a metric and feeds that input into every learning initiative, he also wants greater financial links to performance and more intensive evaluation of training interventions.

"There are 11,000 individuals contributing to make JetBlue an innovative company, and these folks are full of energy," he says. "We can control interactions with our customers through culture, climate and technology, but the company must change its levels of development and communication. It is a frustrating, challenging, and energizing time."

Results-Orien

ted Learning

Cedric Coco, Microsoft's general manager for engineering excellence, carries a heavy load. He is responsible for process and job redesign, a task linked to the performance of 30,000 engineers and information technology professionals.

Microsoft recently made the transition from a traditional training orientation to a performance improvement organization focused on results-oriented learning. Coco's nearly 100-member team defines the requirements for career success at Microsoft, ties them to business strategy, ensures accountability, and embeds learning at every possible turn.

Acknowledging that Microsoft's engineering staff has high expectations, Coco expresses a great respect for his audience and the knowledge that it generates, as well as the knowledge that it seeks.

"In a traditional training model, someone owns the knowledge," Coco says. "Learning professionals generate only 10 percent of the knowledge. It's all about community and collaboration, and we must act like hockey goalies, moving the knowledge puck around, keeping it in play, and predicting where it will go next."

Performance intervention

Part of the strategy calls for utilizing managers as coaches. The company's career model framework, designed to address the development needs of all employees, com-

prises a rich set of tools that drives candid and meaningful coaching conversations between managers and employees.

The tools include competencies linking with each employee's profession and career path; career stage profiles that define what is appropriate progression in each stage of an employee's career and what paths are available; and an experiences grid that defines the best job experiences needed to develop a pipeline of future company leaders.

"Performance intervention are significant strategic words for us," Coco says, explaining the range of solutions used by the learning and development team in performance improvement. Training in the traditional sense is the end result in only about one of six areas influencing human performance.

Despite the technical demands of the company's business, Coco and his staff espouse creativity.

"We are akin to a community of artists," says Irada Sadykhova, Microsoft's director of learning strategies for the engineering excellence division. She notes innovation is a necessity to maintain Microsoft's competitive standing.

"Microsoft has a very diversified line of products and strives to be on the cutting-edge of software development," she says. "Our performance improvement and learning solutions must be unique and progressive and, as a result, we need to be creative in delivering learning to engineers."

The software company's corporate strategy includes personal development.

"Our role is to facilitate the process of aligning all of the dynamics of our workforce to make an employee effective."

—Cedric Coco
General manager,
engineering excellence

Revamped onboarding program

The learning and development team provides internal consulting regarding performance issues. One metric identified for improvement over the past 12 months was employee retention. To accomplish this goal, the learning staff revamped the new employee orientation program to provide better acclimatization to Microsoft and its corporate culture.

The program includes core classroom offerings by the human resources team, classroom and online offerings from the core learning organizations, and peer mentoring to assist in the onboarding process.

Each new employee receives information about the company's mission, culture, and commitment to corporate citizenship. He is introduced to the resources available to understand corporate processes and tools, as well as employee benefits. The HR team also conducts a series of check-ins with new employees and managers. As a result, low-tenure attrition has dropped by 40 percent within one year.

Orientation also plays a critical role in improving an employee's readiness to contribute, especially for staff members who join Microsoft as a result of acquisitions. A detailed road map was developed for the process.

Learning teams design a customized learning program that introduces new employees to the company's systems and competencies. Through this approach, which partners the learning organization with the vendor integration team, time to employee readiness has been reduced from between 10 and 12 months to between four and six months.

Performance development

Classroom training and e-learning courseware help managers and employees maximize effective use of the tools. Subsequently, employees take advantage of courseware and embedded learning solutions that are mapped to individual behavioral statements within each competency.

A mid-year review ensures that career development and coaching conversations take place. The manager and employee discuss immediate career goals and how they correlate to the employee's long-term career aspirations.

To identify strategic performance development needs, Coco's group relies on the pipeline support plan developed for each engineering discipline, which takes a three-year perspective in defining how Microsoft will develop its engineering workforce.

"This is the strategic plan for our people," he explains. "We tried to answer the question: How does our business have to evolve over the next three years?"

Workplace learning and development professionals also served as consultants during the establishment of new business centers outside the United States. They were involved in the planning process, location selections, and all of the startup activities.

After the initial plans were delivered and the locations identified, the learning organization created business leadership teams to serve as the advisory committee for local learning resources. Learning content, facilities, and resources were established and deployed in time to train the new workforce.

Employee effectiveness

Microsoft outsources a portion of the design and delivery of selected learning solutions, notably instructional design and classroom delivery. Its objective is to develop and maintain resident expertise in performance improvement without building costly bench strength in instructional design, e-learning production, and facilitation.

A dedicated purchasing department has been established, which specializes in procuring learning solutions exclusively. A list of preferred vendors has been identified.

The Seattle software organization strives to create embedded solutions that minimize the time an employee must spend away from his job in dedicated learning and development activities. Delivery methods run the gamut, and take audience characteristics into account.

"We must really consider different generations," Sadykhova explains. "Innovative training methods—such as simulations, games, podcasting, wikis, blogging and other on-demand learning methods—are being used to reach the younger generations of the workforce."

No matter what direction Microsoft's employees take along their career path, the choices they make regarding personal improvement are consistent with the company's corporate strategy.

"Everything we do is integrated with business processes at the learning organization level," says Coco. "Our role as learning and development professionals is to facilitate the process of aligning all of the dynamics of our workforce to make an employee effective."

Lifelong Learning

Manufacturing facility approaches learning with creativity and commitment.

In the northwest corner of South Carolina, near Clemson University, sits the 130,000-square-foot manufacturing facility for U.S. Engine Valve, a joint venture between American and Japanese companies that was founded in 1987. The company employs 325 people, 250 of whom are production technicians.

Despite the assembly line nature of the company's business, the organization is about more than just routine production. A spirit of entrepreneurial creativity pervades the plant, and everyone's voice is heard. The training and development team encourages creativity, and they attack their tasks with genuine commitment. The two-member team links staff development with business goals and fosters a corporate culture of lifelong learning.

What Cindy McKee, the facility's continuous improvement manager, and Amy Cribb, its training coordinator, are most excited about is U.S. Engine Valve's recent adoption of e-learning for training production technicians. Nearly 60 percent of the company's learning content is devoted to procedures, business practices, and quality—but it didn't always work.

Blended e-learning

New production technicians receive four to six weeks of on-the-job training when they are paired with a qualified trainer. Previously, a portion of the training consisted of reading job aids and watching videos on machine operation.

"The videos contained thorough information on the equipment, but they were proven to be ineffective," Cribb says. "Additionally, the information in the job aids

was redundant and didn't engage the trainees."

The solution was to integrate all of the disparate formats into a blended e-learning program—the multimedia interactive self-paced training tool. Built in PowerPoint, the course was videotaped and edited by Cribb. The training tool comprises eight modules, each of which includes a two- to eight-minute video clip and an interactive component, such as a simulation or multiple choice questions.

The program uses hyperlinks and programming, which allows the user to proceed through the material at his own pace but does not permit the skipping of any sections. Initial Level 1 evaluations demonstrate that trainees find the format much more engaging than previous methods, earning 4.8 on a 5-point scale.

"We are seeing greater excitement about the learning and much better evaluations," Cribb says.

McKee also leads the lean tools team, which adopts and applies techniques to reduce cycle time. In the past year, the plant faced customer demands for price reductions while attempting to safeguard profitability and shareholder satisfaction.

"The need to eliminate waste was imperative," McKee says. "Although 5S (a standard workplace methodology) and total productive maintenance were already part of the culture, other lean manufacturing tools were needed to identify and eliminate waste."

To gain senior management support, training on the new lean tools began with them. McKee showed how value stream mapping and standardized work would help to meet customer and plant demands.

Training was delivered throughout the company, reaching all levels

of management and associates. For plant floor employees, the training is conducted in 30-minute sessions at all associate meetings during each shift. The content included an overview of the lean tools, followed by comprehensive training on each of the six remaining tools. Currently, all plant employees have completed the lean overview, and 62 percent have participated in error-proofing training.

Standardization

A cross-functional team was created to reduce inventory, which is part of a multi-step process to eliminate waste and meet the aforementioned business goals. Using lean tools, inventory was reduced by 12 percent. Lean manufacturing principles, especially standardized work, have also been applied to administrative areas. For example, each department had its own format for documenting tasks, but it was hard for new employees to

"Upper management has always been involved in training. Through the development of this plant and its culture, the business has always valued training."

—Cindy McKee
Continuous improvement
manager

find the instructions. Pursuant to the lean effort, departmental procedure sheets were created as standardized work instructions that each department must create to detail administrative processes.

"Job books existed for most administrative tasks but they were antiquated, not uniform, and most were not available electronically, which made updating difficult," Cribb explains.

Cribb and McKee worked with administrative employees to create templates, develop standardization methods, establish a numbering and naming convention, and ensure stakeholder participation and ownership. By the end of 2005, 67 percent of the plant's administrative departments created departmental procedure sheets, which contributed to raising the lean manufacturing audit score for standardized work from 5.1 to 5.3 on a 5.5 scale.

Efficient training

Required training on emergency shutoff procedures was converted to an e-learning format as well. Previously, the training was conducted in hour-long sessions, one for each of three shifts, plus one makeup session. The subject matter expert would lead the participants to the various areas of the plant and explain the procedures.

"A lot of time and resources were used for very little learning and performance improvement," Cribb says. Now, via the e-learning program, associates can complete the training on their own time in about 20 minutes. Although a written mastery test must be completed, the effectiveness of the learning is also verified by a walk-around examination

in which trainees must demonstrate the emergency shutoff procedures.

The effectiveness of the e-learning programs is also measured using control groups. Associates who have completed the e-learning courses are observed and filmed while performing required operations. The video is then reviewed and data is analyzed to compare improvements in that group versus those who received the traditional training.

Performance development

Cribb reports to McKee, who reports directly to the plant manager. Their efforts are driven by a five-year strategic training plan, which is updated annually to support the performance goals of the plant and individual development goals. The plan is populated by responses from a needs assessment survey by senior managers, production managers, supervisors, and engineers. Each training initiative is linked to a specific organizational performance goal such as finance, safety, or leadership.

Another dimension of the plan is derived from associates' annual reviews in which they generate personal development plans based on previous performance or needs identified to achieve new goals. Cribb and McKee compare and coordinate those plans to identify critical areas of need and monitor the satisfactory completion of performance goals.

Business conditions and plant performance drive all decisions made on selecting and designing learning and performance interventions and initiatives. Further, all employees are encouraged to submit continuous improvement sugges-

tions to increase overall plant performance. If a suggestion is selected for implementation, the employee works with Cribb and McKee to help analyze the problem and develop a solution.

Support for employee learning and development at U.S. Engine Valve has always been strong, according to McKee, who has been with the company for 10 years.

"Upper management has always been involved in training," McKee says, noting that she has consistently received the budget necessary for implementation. "Through the development of this plant and its culture, the business has always valued training."

All of the company's executives participate in learning events as instructors or speakers, and 55 percent of the senior management team are certified facilitators for Achieve Global.

An annual employee satisfaction survey also helps uncover development areas that need improvement. In 2004, survey results showed a need for improved supervisory skills. Senior management swung into action, conducting monthly skills training for plant supervisors on such topics as rewards and recognition, coaching skills, performance evaluation, team building, and constructive feedback.

After the training was completed, the satisfaction rating on the next employee survey rose 6 percent.

Soon, the manufacturing company will restart Achieve Global's "genuine leadership" program, which includes six monthly modules that will continue to develop the team's leadership skills.

Driving Business Performance

Department store transforms its training department into a corporate university.

“Going forward, we must prove our relative worth by producing results that drive business performance.”

—John DiBenedetto
Vice president of talent planning and development

When John DiBenedetto came to Wal-Mart from The Limited in 2005, he faced a challenging task: leading the transformation of Wal-Mart’s domestic training department to a one-stop talent planning and development organization, called Wal-Mart University.

The company’s domestic business unit employs 1.4 million associates in 3,600 stores. The talent planning and development organization that serves this unit includes home-office and field-based HR professionals. Within learning and development, there are teams for performance consulting, instructional design and development, and instructional technology and delivery.

The transformation of the learning organization is part of a much larger company initiative.

“Our company is currently undergoing sweeping changes throughout the organization to improve operating structure, workflow processes, and procedures,” DiBenedetto says.

While undergoing its own transformation, the Wal-Mart University team also plays a strategic role in helping to trigger a broader change. In

doing so, the team has widened the definition of competencies and implemented personal development plans. The team also launched a new corporate university, honed its measurement and evaluation skills, and began using a wide range of delivery methods to reach its vast constituency.

“Wal-Mart’s previous investments in training were unable to affect the large-scale change that is currently required,” DiBenedetto says. “As we are reengineering our business, many operational processes are being redesigned. Our performance consultants are aligned with specific stakeholders and functional groups, and to specific business challenges. As we focus on competency development for our associates based on their new roles, we are offering a whole suite of solutions called ‘The SuperCenter of Learning.’ We are unfreezing the old ways of doing things.”

Competency-based training

Previously, training at Wal-Mart was delivered primarily through instructor-led and computer-based training. In order to educate the company’s

former district managers who are now market managers and who, as a result, need to develop a new operational perspective, the Wal-Mart University team designed an innovative business simulation that teaches them how to develop the stores within their markets, analyze markets, and focus on process improvement.

The simulation, which takes about six hours to complete, employs a discovery learning map, cards, a narrative participant guide, and other interactive measures. Market managers play it in small groups at their fiscal year kickoff meetings. DiBenedetto reports that Level 1 and 2 evaluations have been excellent.

“In our prior training efforts, there was no science behind the solutions,” he says. “With this simulation, we have mapped high-performance elements to the learning solution. Our approach is very competency-based.”

An 18-month project, developed through competency modeling, has focused on building competency models for all Wal-Mart employees, from merchandising to the stores. As those models are completed for individual job titles, they are passed on to the design and development team, which then provides instructional design services.

The learning and development service model is based on an Associate Investment Model (AIM) Toolkit, which is built on the foundation of the targeted competency model for a particular job. The AIM Toolkit consists of three phases: onboarding, foundational, and advanced. The onboarding phase takes place during the first 30 to 60 days on the job and consists of corporate culture, diversity, and orientation. DiBenedetto says the new-hire orientation has become critical because turnover among retail employees is high industrywide.

**—John DiBenedetto
Vice president of talent
planning and development**

“We are very selective about how much training is flowed out to employees in the first year,” he says.

The foundational phase occurs at a point between 90 and 120 days on the job. This phase gives the associate access to targeted skills training that is tied directly core competencies. The advanced phase is avail-

able to associates later in their tenure. It provides higher-level learning and is targeted to specific competency gaps that are identified in partnership with their management teams.

The AIM Toolkits have their official home in Wal-Mart University, which was launched earlier this

year. Designed to constitute a "The SuperCenter of Learning," it features a branded motto and materials: "My knowledge, my performance, my potential." Accessed through the company intranet, Wal-Mart University will facilitate the creation of individual development plans and will offer a suite of solutions.

Team effort

Store managers and functional area supervisors will also play a critical role in delivering new kinds of training at Wal-Mart. Where appropriate, the company subscribes to Noel Tichy's leader-teacher model, and designs learning to be cascaded throughout the organization.

In an initiative to introduce new store accounting policies, supervisors received training on the new procedures as well as how to facilitate that learning among their direct reports. Accounting associates were also provided with a suite of on-demand learning solutions, which included change champions (designated accounting office trainers), quick reference guides, daily activity posters, updated accounting guides, and training plans.

Store-based training staff are critical to the success of learning and development initiatives, and to the bottom line. Called "change champions," they were carefully selected and have received special training.

"They must have a passion for developing people, and good platform skills," DiBenedetto says. Without them, Wal-Mart "would need thousands of facilitators otherwise."

The store managers also facilitate daily customer information sharing sessions. The sessions last

10 to 15 minutes and are designed to deliver consistent messages on topics deemed important to the business. The Wal-Mart University team is also revamping its e-learning offerings and attempting to use that delivery method strategically. Currently, employee orientation and basic skills training are computer-based using an asynchronous platform. Each store has its own computer lab and training coordinator.

"We are putting a full-court press on performance and retention by creating many new strategies dedicated to improving associate engagement," DiBenedetto says. Onboarding is one process targeted for improvement.

Wal-Mart has the largest e-learning network in the world, comprising hundreds of modules. Those modules also are receiving a critical look. A full-time instructional technology team is assessing all of the offerings, tweaking satisfactory ones, and discontinuing others. It's crucial that they get this part right, says DiBenedetto, because the network is the primary means to reach associates in stores.

Change management

In addition to role- and tenure-based competency development, the Wal-Mart University team also facilitated the creation and adoption of new companywide talent strategies and practices. New operating procedures that incorporate industry best practices have been created in multiple operating areas.

Team members built an entire relationship management team of directors and senior managers with the sole focus of change man-

agement via learning events. Their primary responsibility is to engage with stakeholders and oversee the construction of learning solutions and implementation of strategy in tandem with the operational changes. The supervisor-led training for store accounting departments is an example of one of those learning solutions.

The effects of that particular effort have borne fruit. Task redundancies decreased, productivity increased, fraud decreased, and compliance increased. These results have saved Wal-Mart millions of dollars during the program's first year.

The impact of the learning function is measured in a variety of ways. The most common method is to measure the reaction through the use of course evaluations. The transfer of knowledge will be measured through change in associate behavior and in business performance. Information is gathered through customer surveys, leadership surveys, error-rate monitoring, mystery shoppers, and quantitative analysis of point-of-sale performance data.

This year and next, DiBenedetto and his staff are redesigning the measurement of all programs. Wal-Mart has partnered with the ROI Institute to create methods for conducting all five levels of evaluation and plans to produce a quarterly learning scorecard.

"We are turning the ship upside down," says DiBenedetto, "But we are by no means finished. The BEST Award really goes to our corporation for having the courage to invest in the learning function. Going forward, we must prove our relative worth by producing results that drive business performance."



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