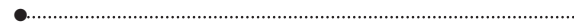


VIEW FROM THE TOP

At the recent Corporate University week, senior learning executives from leading organizations share advice and opinions on informal learning, program measurements, and speaking business.



By Linda Galloway

Senior learning executives from CIGNA, Cisco, Deloitte Consulting, IKON, Toyota, and Unisys gathered for a panel discussion at the recent Corporate University Week in Orlando, Florida. Three of the panelists—Sara Mills, Karen Petersack, and Ellie Tymer—represented corporations recognized for achievement and leadership in corporate training.

This article captures some of the discussion. One of the major points emphasized by all of the panelists is the importance of applying focused training programs to clearly defined business issues. As these executives pointed out, meaningful measurements, executive attention and sponsorship, and IT support are usually much easier to obtain when training is aligned to business. Another observation is that although these executives are responsible for large, enterprise-wide learning organizations, many of their problems and challenges are the same as those encountered by managers of much smaller training departments. The advice and opinions are relevant to any learning organization.

The Panelists



- Moderator Tom Kelly
vice president
Internet Learning Solutions
Cisco Systems



- Candy Haynes
associate global director of learning
Deloitte Consulting



- Karen Kocher
vice president
CIGNA Technology Institute
CIGNA



- Sara Mills
vice president of learning
and development
IKON



- Karen M. Petersack
associate dean
Technology School
Unisys University



- Ellie Tymer
national associate dean
University of Toyota

Q One of the imperatives we keep reading about is the importance of making training strategic. How can training managers make that happen?

Sara Mills The primary way we've elevated training is to align the company's strategic goals with training initiatives. To do this, we follow five steps:

1. Align workforce plans and workforce requirements to strategic goals. For instance, if corporate growth is an emphasis, determine what workforce changes and skills will likely be needed to execute the plans.
2. Conduct a gap analysis to determine the skills currently possessed within the organization and those missing. We have an LMS that facilitates this process.
3. Identify areas requiring re-skilling and develop plans to accomplish that.
4. Determine how to assess and measure key re-skilling and development programs.
5. Prioritize initiatives according to the priority of company objectives.

We take this information in the form of a presentation to our executives and senior management team. None of this is rocket science. It's really a matter of following the money trail and aligning programs accordingly. By communicating results and anecdotal successes periodically, you can keep your department's work and its contributions in front of an executive audience.

Ellie Tymer It's very important to speak the language of your executives. You can't expect executives to get excited about the number of learning objects completed. They want to hear about money and time saved and other direct business results. We've come to better understand business needs and issues by placing training people within business units, where they can see and hear firsthand the problems that need to be solved.

Q But how does training get a foot in the door of the executive suite? Sometimes that's a huge challenge for training management.

Karen Kocher Compliance issues are a sure way of getting the attention of top executives. For us, the requirements of HIPAA (Healthcare Insurance Portability and Accounting Act) was the way to the

executive table. We put together an executive coaching program centered around HIPAA that introduced e-learning to participating executives, met compliance requirements, and demonstrated cost-savings. Executives walked away with a much better idea of what we do, how we do it, and the value that we add to the organization.

Another thing we've done is to develop a skills inventory that identifies the skills we need within the organization and those we actually possess. The CIO has been one of our champions. This project has also helped us promote training to the executive level, because we could actually quantify the skills needed to execute on corporate goals.

Candy Haynes We also had a chance to demonstrate the strategic value of training with new compliance requirements for accounting and consulting. Because our company had to get training to a large, dispersed audience in a very short time, we demonstrated the value of learning technology—Centra, for instance—for a business-critical initiative. Executives saw learning as a leader in achieving significant contributions and facilitating business change.

Mills Training programs for leadership, management, and ethics will also command attention. Executives know that deficiencies in this area can lead to serious and expensive business problems.

Q Do you all agree that one of the challenges of informal learning is changing people to become self-driven?

Tom Kelly I know at Cisco, we feel strongly that it's our job to provide an environment that promotes learning and career development, but not to choose an employee's career. We provide the skills development tools and knowledge, but employees bring the passion and ambition.

Kocher That's true at CIGNA, too. *Business Week* was talking about the importance of people assuming the responsibility of employability back in 1996. We support that philosophy and see our responsibility as providing the training required to develop identified essential job skills.

Haynes Deloitte employees are naturally self-directed. The overall attitude of Deloitte professionals is, “I want to get as much training as possible.” We encourage people to take advantage of all available training activities.

Karen Petersack At Unisys, we also provide the tools for our employees to engage in informal learning. One of the biggest challenges we have is getting employees to understand that learning does happen informally and doesn't always require taking a course. This year, we are implementing a development system that will help employees select both formal and informal experiences for skill building.

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Q How closely is technology tied to your training successes or failures?

Haynes A big part of our success is our ability to use technology effectively. If you look at learning as a shopping mall experience, our anchor stores are our technology partners—Saba, SkillSoft, and Centra. We put the responsibility on them to make everything work and position us for future advancements.

Tymer Not having the right technology can be very painful and limiting. For instance, until we had an LMS, employees had to deal with multiple log-ons to access different resources. We didn't have the technology to facilitate communities of practice. We're counting on our new LMS to address these and other past obstacles.

Mills There's no doubt, IT infrastructure issues can become your nightmares. One of the most important things you can do is to get the senior VP of IT on your side.

Kocher Our department has to deal with the same technology issues faced by many other companies.

CIGNA is a very conservative company, and we don't adopt new technology quickly. For instance, bandwidth definitely impacts our training decisions. The global rollout of training can be quite challenging because of diverse and sometimes limiting technology environments.

Petersack We know we need to include IT early in the cycle when rolling out global initiatives if they are to be successful. They can help us identify issues we might encounter with bandwidth and technology constraints.

Kelly That's why we sometimes first pilot new training initiatives outside of the United States. We've found that if we can solve those technology problems, the U.S. launch will be easy.

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Q Does your organization set annual training goals and, if so, what kind of measurements do you use?

Tymer We work with business units to set goals that have job relevance, rather than set overall goals based on training hours or courses completed. Tying goals to job requirements, such as IT certifications and important skills, is much more meaningful. We leave it up to the business units to determine what makes sense.

Petersack The goals of Unisys University are very broad in scope. We certainly are always looking for cost-efficiency measurements: delivering learning solutions more effectively and efficiently with less funding. But we also set goals around other factors, such as certifications completed and improvements in first-time pass rates, decreases in response times, and increased levels of quality to RFPs.

Haynes We watch factors such as cost per practitioner and usage, but we're getting to a point where numbers such as that are hard to improve upon. For instance,

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we're already at an 80 percent usage rate. We also look at hits, type of learning resources accessed and access rates, and time spent. I strongly believe if you focus on measuring completions, you're guaranteed to look bad. Right now, we're also trying to look at broader indicators such as retention and trying to highlight training's impact on these numbers. When we can cite evidence that practitioners view learning as a reason to stay with Deloitte, we've made a significant difference.

Kocher One of the measurements we monitor is internal hiring. We assume there's a strong correlation between learning and hiring professionals from within the organization. We also look at unit costs—for instance, the cost per employee and cost per course. We're always trying to drive those numbers down. Informal learning is one way we've found to be able to offer more to our employees at less cost.

Kelly At Cisco, the issue isn't so much spending less; it's typically doing more within our budget and doing it with less waste. We look at following factors such as customer satisfaction and assessing its relationship to training. We are also focusing on the information needed for various business initiatives and our ability to deliver resources at the time they're needed. Really, one of the most important aspects for any training deliverable is timeliness. The value of training diminishes with every day that passes beyond the identified date of need.

Q What's your department's philosophy on testing? Do you do it in your organization?

Haynes When it comes to training, our organization is somewhat bipolar. Part of our population is very focused on testing and expects it; the other part generally feels it's not needed and doesn't like to be tested.

Kelly Rather than testing just to test, we try to assess success in the three steps of the learning process: 1) knowing the information, 2) understanding it, and

3) successfully applying it. As a metric, testing is more important than completion. It's more relevant.

Petersack At Unisys, we have a CEO who truly believes that every formal learning experience should include some form of Level 2 evaluation to ensure that learning has occurred. So for us, this has mandated that all courses contain a Level 2 testing evaluation.

Q What's the role of just-in-time training within your organization?

Tymer People in my department call me the "queen of just-in-time training." I feel that strongly about it. Giving employees easy, 24/7 access to just the information they need has a huge impact on productivity, especially in a knowledge worker environment.

Kelly One of my favorite lessons was that you don't have to memorize the formula; you just need to know where the book is. That's why informal learning is so important. I think you're going to see much more emphasis placed on just-in-time learning across the board, especially around informal learning.

Kocher I also strongly believe in the value of informal learning. To convince our executives of its value, we did a pilot project with *Books24x7Referenceware* and our help desk staff. We showed how *Books24x7* gave our help desk professionals the ability to quickly find the information they needed to answer the incoming questions. By showing how this resource directly reduced the length of time spent on the phone and the accuracy of the answers supplied, we got the budget that was needed.

Q What has been your experience in implementing communities of practice? Do you have any success stories to share?

Pick something important to the business, give it 100 percent focus, and follow it through to the end.

Kocher We've seen the role of communities of practice as ways of reinforcing and supporting various career paths, learning plans, and different formal and informal learning activities. Our vision is for these communities to be self-sustained and driven by employee momentum, not our department. For instance, one community is built around code sharing and is facilitated through *Books24x7's* collaboration features, which let people share bookmarked sections and notes and set up common reference bookshelves.

Kelly One area we've had success is instructor community practice areas, where employees can discuss global training issues, as well as share instructional materials and general best practices.

Petersack We have communities around various product development practices. These have proven to be invaluable because we have product development initiatives throughout our company, not just in one location. We've definitely found that these communities of practice positively impact speed to market and the overall development process. Another area we've had success in is project management.



Q If you could offer a single piece of advice to a training manager, what would it be?

Petersack Most of us don't have enough time, people, or money to get everything done. Pick something important to the business—something strategic—give it 100 percent focus, and follow it through to the end. A spotty approach—where you try to do something for everyone—almost never shows dramatic results.

Haynes I agree. Find one of your company's major initiatives—in our case, it was the demand for improved performance counseling throughout the enterprise. We used this business issue as a chance to demonstrate our ability to contribute and the speed at which we could do so. We put together a performance counseling curriculum, 80 percent of which comprised off-the-shelf courseware and 20 percent custom courseware. We used Centra to announce the program and supported it with resources from *Books24x7*. All offices around the globe got the same, consistent message at approximately the same time.

Kelly Candy is right. The most important thing any training department can do is to solve a business problem. One of our recent examples is a program we built specifically to address knowledge and training issues that were affecting the performance of our software engineers.

The metrics of success were about the business outcomes desired, and had nothing to do with traditional training metrics such as number of students trained.

Mills We all seem to agree on this. When we looked at our own department resources and what needed to be done within the enterprise, we decided to focus on management training.

With more than 3000 managers in our organization, we believed it would be a good investment and something that would have significant business impact. If you look at why employees quit, one of the very top reasons given is their managers or supervisors. We also knew this was a very underserved market. The general philosophy was a sink-or-swim approach.

We focused on giving managers the training they needed to improve both team and individual performance—skill development in such areas as coaching, teambuilding, and handling conflict. We also gave them various job aids, such as a meeting-in-a-box tool, to help them with better day-to-day management.

Kocher Another piece of advice I'd offer is to utilize the experts within your own organization as learning resources.

Kelly Absolutely. Training people often overlook the valuable resources they have in their own backyards. We use weekly broadcasts and video to put experts out in front of the company. These delivery vehicles use experts' time efficiently, which is also incredibly important, especially to them. **TD**

Linda Galloway, a veteran of business technology marketing, has been working with organizations involved in e-learning for more than five years and is a frequent contributor to trade and business publications. Her firm, Apollo Associates LLC, provides a variety of marketing services for technology-related companies and technology adopters; lgalloway@apolloassociates.com.