

Profiles in this section were written by Jennifer J. Salopek, Darin R. Painter, Josephine Rossi, Michael Laff, Aparna Nancherla, and Paula Ketter.

BETTER THAN THE REST

We're often asked "What does it take to be BEST?" It isn't just one thing that makes a company a winner of an ASTD BEST Award. Organizations only make it to the ranks of the BEST if they can demonstrate excellence in several of these areas: alignment, C-level involvement, efficiency, effectiveness, innovation, investment in learning, learning opportunities for employees, measurement of the effectiveness of learning, and success with nontraining solutions to business needs. Those characteristics have been exhibited by BEST winners since ASTD created the award in 2003.

BEST organizations report improvements in employee and customer satisfaction, the quality of their products, cycle time, productivity, retention, revenue, and overall profitability. In other words, they are able to link learning to critical business concerns.

Strategic plans and corporate objectives are the root of most BEST organizations' learning and performance activities and the winning companies have clearly defined processes to link their learning strategies and initiatives to increases in individual and organizational performance.

BEST winners often report an increase in the number of employees trained as their primary achievement in efficiency, followed by improvements in time to deploy new learning initiatives and to get new employees ready to be productive. BEST winners report that process improvements also help them be more efficient.

The winning companies use many approaches to select and design learning initiatives to improve performance. BEST organizations save time on content development, often using technology to design and deliver the learning in less time than in the past. Their greatest gains in efficiency come from the use of technology, as well as from improving existing courses and restructuring their distribution. For example, some companies are integrating their learning management systems with their performance management systems to better align individual performance with company goals.

BEST organizations strike a balance between training and other kinds of efforts. For the past three years, the winning organizations have allocated nearly half of their learning functions' resources to nontraining activities such as performance analysis, organization development, talent management, and process improvement. Looking at the BEST organizations, one can see a number of examples of the integration of activities related to employee development at all stages from recruiting through retention.

Many BEST organizations involve their top leaders, including the CEO, as teachers and mentors. Their CEOs support the corporate university, viewing it as a way to help prepare the next generation of leaders designated by the company's succession plan. Companies gain efficiencies too, by developing managers as trainers.

Technology continues to play a growing role in BEST companies' learning activities. They report that it has helped them launch learning programs in dramatically less time than in the past, increase the number of initiatives launched, and reduce development time. Many of the companies use "time to deploy" as a metric for efficiency.

In short, BEST organizations don't win that distinction by being effective at only one thing. They perform well across a range of activities, work constantly to improve, and can demonstrate that their efforts deliver results. In the view of our judges, that clearly makes them the BEST.



2007 BEST Award

Rank	Organization	Corporate Headquarters	Number of Employees	Industry	Page
1	Satyam Computer Services	Hyderabad, India	42,000	Information technology	30
2	sanofi-aventis U.S.	Bridgewater, New Jersey	16,000	Pharmaceuticals	34
3	TELUS Communications	Vancouver, British Columbia, Canada	28,900	Telecommunications	79
4	BD (Becton, Dickinson & Company)	Franklin Lakes, New Jersey	27,000	Healthcare	38
5	Deloitte & Touche USA LLP	New York, New York	40,000	Professional services	42
6	U.S. Army Armament Research Development and Engineering Center	Picatinny Arsenal, New Jersey	2,940	Research and engineering services	46
7	Equity Residential	Chicago, Illinois	5,200	Real estate property management	50
8	Wachovia	Charlotte, North Carolina	108,000	Financial services	54
9	The Home Depot	Atlanta, Georgia	364,000	Retail	58
10	Air Products and Chemicals	Allentown, Pennsylvania	18,112	Manufacturing	68
11	Wipro Technologies	Bangalore, India	48,891	Information technology	81
12	EMC Corporation	Hopkinton, Massachusetts	30,500	Information management and storage	72
13	Checkfree Services Inc.	Norcross, Georgia	3,600	Financial e-commerce services	68
14	Telkom SA Limited	Pretoria, South Africa	27,273	Telecommunications	79
15	BB&T	Winston-Salem, North Carolina	28,900	Financial services	70
16	UT-Battelle, LLC—Oak Ridge National Laboratory	Oak Ridge, Tennessee	4,100	Research and development	80
17	Ruby Tuesday Inc.	Maryville, Tennessee	53,080	Food services	76
18	Tata Consultancy Services Limited	Mumbai, India	93,000	Information technology	62
19	BJC HealthCare	St. Louis, Missouri	26,622	Healthcare	70
20	Caterpillar	Peoria, Illinois	94,593	Manufacturing	71
21	Scottrade	St. Louis, Missouri	1,462	Financial services	78

Winners Ranking

Rank	Organization	Corporate Headquarters	Number of Employees	Industry	Page
22	Infosys Technologies Limited	Bangalore, India	59,427	Information technology	74
23	ICICI Bank Limited	Mumbai, India	35,000	Financial services	74
24	Clarkston Consulting	Durham, North Carolina	300	Professional services	72
25	Nemours	Jacksonville, Florida	3,745	Children's healthcare	76
26	Microsoft	Redmond, Washington	70,000+	Application software	78
27	Anel Corporation	Winona, Mississippi	178	Manufacturing	69
28	Howrey LLP	Washington, D.C.	1,515	Professional services	73
29	Baptist Health Care	Pensacola, Florida	5,046	Healthcare	70
30	Highmark (an independent licensee of the Blue Cross Blue Shield Association)	Pittsburgh, Pennsylvania	11,000	Financial services	73
31	WakeMed Health & Hospitals	Raleigh, North Carolina	7,104	Healthcare	81
32	American Express Company	New York, New York	65,400	Financial services	80
33	Gables Residential	Atlanta, Georgia	1,261	Real estate property management	73
34	ETS	Princeton, New Jersey	2,500	Educational services	72
35	American Home Shield Corporation	Memphis, Tennessee	1,884	Home related services	69
36	Saskatchewan Telecommunications	Regina, Saskatchewan, Canada	3,517	Telecommunications	76
37	Lawrence Livermore National Laboratory	Livermore, California	7,421	Scientific services	75
38	Alliance Data	Dallas, Texas	8,737	Loyalty marketing	69
39	iQor, Inc.	New York, New York	7,000	Call center services	75
40	LexisNexis	Dayton, Ohio	13,700	Information services	76
41	BWXT Pantex	Amarillo, Texas	3,400	Manufacturing	71
42	The Schwan Food Company	Marshall, Minnesota	22,000	Food services	79



Managing Massive Change

THE SATYAM WAY

Satyam Computer Services Hyderabad, India

In the past two years, Satyam Computer Services changed its business model completely, seeking to retain the entrepreneurial spirit that generates innovation without sacrificing quality in the face of phenomenal growth—from 100 employees in 1992 to more than 42,000 in 2007. The key was to keep the core essentials and avoid stagnation.

The result is the new Satyam—an organization that consists of more than 2,000 independent, interdependent, full lifecycle businesses (FLCBs). Each business unit has a leader who operates much like the CEO of an independent business, and each unit collaborates with other FLCBs within the company for the necessary products and services.

“Each full lifecycle business is run as a small business that aggregates up to the integrated businesses and ultimately to the enterprise called Satyam. This takes outsourcing to the next level, but all of it is conducted within Satyam,” explains Ed Cohen, senior vice president of Satyam’s School of Leadership. The company evolved from an emphasis on growth to an emphasis on balancing assets and outcomes for greater value creation. This approach has four components: rapid growth, entrepreneurship, innovation, and quality.

Communicating and explaining the advent of FLCBs generated a large-scale change management effort

that challenged Satyam’s learning and development team. Working with 60 senior leaders who each volunteered two hours, three full-time workplace learning professionals designed and delivered the learning program known as the SatyamWay to 28,000 associates in just 75 days.

Introduction of the change process was achieved through a two-part web seminar. The first part used a prerecorded radio talk show format in which three senior leaders provided foundational information that was enhanced with on-screen presentations. In the second segment—a live, synchronous session—associates were able to ask questions to senior leaders via a moderator. The seminars were accompanied and supported by a book and website published specifically to explain all aspects of the SatyamWay. A certification exam to measure

Ed Cohen (left) and Rajul Asthana built a successful learning culture that encompasses all 28,000 Satyam associates.

knowledge acquisition was a critical follow-up element.

According to Rajul Asthana, vice president of Satyam's learning center, "Through the development of this program, we demonstrated that we can quickly participate in any kind of high-level rollout. We had all the right pieces and didn't have to chase anybody down. We showed that senior leaders were involved from the beginning, and we set the expectation for certification and provided resources for that. I think the program proved that learning doesn't have to be mandatory for people to come out in large numbers."

A second requirement of the new FLCB model was to educate those who would be the leaders of the new businesses. For them, the Satyam School of Leadership developed a year-long certification program with four phases, adopting space exploration as a metaphor.

"It's an ongoing challenge to combat turnover among new leaders, and we have learned that the first year is crucial. As we rolled out the FLCB model, we wanted our new leaders to be prepared for maximum success," says Cohen. Five learning professionals worked with leaders across the company for six months to build, test, and measure the program, and also served as personal leadership development consultants to the participants. The end result is a strategy that focuses on success by ensuring close attention to new leaders for the first year.

Phase one—Fueling—welcomes, informs, and prepares the business leaders with resources including the Fueling Kit, a branded box that contains a welcome CD, information on the Satyam Way, and an audiobook, *The First 90 Days*, by Michael Watkins. Phase two—Ignite—leverages e-learning for competency development and resource awareness. Content includes six modules on internal service offerings, three core Harvard mentor courses, three additional Harvard courses determined by competency assessment, and a one-on-one meeting with the leadership development consultant.

Phase three—Lift-Off—consists of a five-day induction program at the company's learning center. The program includes a chairman's dinner, Harvard case studies, and a real-time business simulation that was developed with Booz Allen Hamilton. Phase four—Orbit—allows participants to develop competencies while focusing on roles and responsibilities. They continue to meet with their leadership development consultants as well as with assigned mentors. They also participate in monthly virtual action-learning sessions to solve real-time organizational challenges selected by senior leaders.

"To design and develop the program, we asked ourselves, 'What are the needs of our leaders and how can we help?'" says Cohen. "We interviewed several hundred successful and new leaders, and reviewed data from performance appraisals and exit interviews."

Cohen notes that Satyam's commitment to employee learning is evident in the five-day residential program that makes up phase three. "The only thing we sell is the services of our people. We must respect the fact that this company runs on billable hours. In the past, we have had to fit learning into small snippets of time."

Corporate commitment to, and recognition of, employee learning and development has been growing at Satyam, says Cohen, who notes that the company has supported his efforts with some major capital investments in the past year. Total corporate investment in learning has increased by 4 percent as a percentage of payroll, and Satyam has recently constructed a 240,000-square-foot leadership institute.

For a company experiencing such phenomenal growth, many new employees are also new to the workplace. The learning center staff has the job of educating entry-level employees not only about working at Satyam, but also about their duties and responsibilities. The entry-level technology program is a 15-week, residential, technology-training program for new hires, conducted at the learning cen-

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Rajul Asthana

Vice president of Satyam's learning center

ter's campus. Participants receive baseline training in software engineering as well as technology training based on destination unit, education on company processes, project work in vertical markets, and training on the Satyam Way. The last three weeks are spent working on project teams in various roles. More than 7,000 new employees passed through the program last year.

Asthana says the significant dedication of time and resources is more than repaid in the reduced time it takes employees to gain competence. "This program has resulted in associates who are ready to be deployed on projects in half the time than previously, and who need much less retraining and reorientation once they reach the business units. We can directly tie this program to more than \$750,000 in additional revenue each year." **T+D**

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Mike Capaldi and his training and development staff orchestrated a major sales training initiative at sanofi-aventis U.S.

Sales Training as Dynamic as Big Pharma Itself



The result of a merger between two European companies in 2004, sanofi-aventis employs about 16,000 people at 14 sites across the United States. Of these, approximately 9,000 are field professionals, making it one of the largest in the U.S. pharmaceutical industry. Mike Capaldi, associate vice president of sales training and leadership development, is responsible for the training and development of the field teams.

“Our corporate philosophy toward employee learning has undergone a positive evolution over the past several years,” Capaldi says. “For the first two years after the merger, our focus was on orientation and foundational training. Now, we have turned our attention to providing continuous learning for our tenured professionals.” In fact, Capaldi calls the full development of its continuous learning program the company’s most innovative learning initiative in 2006.

The program is self-directed. It supports both sales in the field and employee development at the home office. It is a combination of more than 700 courses offered via CD-ROM, textbook, audio CD, DVD, and online and classroom training. Every employee is encouraged to create an

individual development plan, and a common competency model extends across the organization. Employees at sanofi-aventis are required to earn continuing professional education hours annually.

The program’s curriculum aligns with corporate values, key productivity measures, and core competencies. Curriculum maps that identify the training programs for each of these areas are available through the company’s learning management system. Once a developmental area has been identified, employees can easily locate an appropriate training course using the maps. Courses are accessed via the LMS and organized by functional area as well as by core competency. Because of the self-directed nature of the learning and the on-demand availability of

sanofi-aventis U.S.
Bridgewater, New Jersey

most of the courses, developmental plans can be as dynamic as the business environment.

Capaldi sees exceptional training of the company's salesforce as a key competitive advantage. "Although there is typically fairly high turnover in pharmaceutical sales—averaging 10 to 15 percent annually—the remaining 85 to 90 percent of employees provide us with the greatest opportunity for performance enhancement," he says.

Market realities also drive training needs in the pharmaceutical industry. In 2006, as sanofi-aventis was facing some marketplace challenges, the company conducted a major reorganization of its salesforce that affected 2,500 field sales professionals and district sales managers. These individuals had to represent products that were new to them, and Capaldi and his team had to bring them up to speed—fast.

"This population needed training in 60 days, so we leveraged new systems—including our LMS and virtual classroom—to deploy cross-training," Capaldi explains.

A web-based platform integrated with the LMS was designed and implemented to communicate the logistics of study requirements, timelines, registration, and travel. Self-paced, web-based technology was used to accelerate the initial training process by providing coursework and content online. Training staff used Brainshark Rapid Learning, an asynchronous development tool, to create online learning objects and track learners' progress.

The pharmaceutical company still relies heavily on instructor-led training, which made up the next phase of the initiative. "Selling skills are very difficult to model and simulate online, and trainees need immediate feedback," says Capaldi. District-based field training specialists were called in to facilitate classes for the targeted population, which was 10 times the usual number trained in a given month. The district sales trainers partnered with training specialists from Capaldi's organization to effectively deliver training in two weeklong sessions with more than 1,000 attendees each.

The initiative was not only successful in helping the company to reach its sales goals; it also broadened the impact of learning to support business objectives across the organization.

"There was a clear goal from a performance standpoint, and a lot of change management. Some salespeople had to learn a completely new therapeutic area and then learn about our products in that area. The success of the program made the learning and development staff even more relevant than before, and we established a lot of credibility. In addition, it was a great experience for the learning organization. We actually restructured our department in midstream. Training specialists got exposure to new tools and applications, as well as project management," Capaldi says.

The company's goal was to maintain a high level of customer satisfaction despite the changes in the deployment of its salesforce, which caused the disruption of some business relationships. The learning organization took a proactive, three-part approach early in 2006 to keep customer satisfaction high.

An enhanced selling skills curriculum was designed and implemented through the continuous learning program. A program designed for marketing managers emphasized a customer-centric approach to brand planning and execution. Coaching workshops on the company's selling model were added to the management development curriculum, preparing managers to improve sales representative performance and ultimately customer satisfaction.

Employees at sanofi-aventis complete about 43 hours of learning per year, and the company invests nearly 3 percent of payroll in learning and performance improvement. In 2006 the company made a major capital investment in learning in the form of a 30,000-square-foot, state-of-the-art training center. "The significant commitment of resources to this facility demonstrates the commitment of our leadership to the learning function," says Capaldi. The facility includes 22 classrooms, a 200-seat auditorium, five

"A big component of the continuous learning program is skills-based training. We are now implementing behavioral change measurement and seeking increased effectiveness."

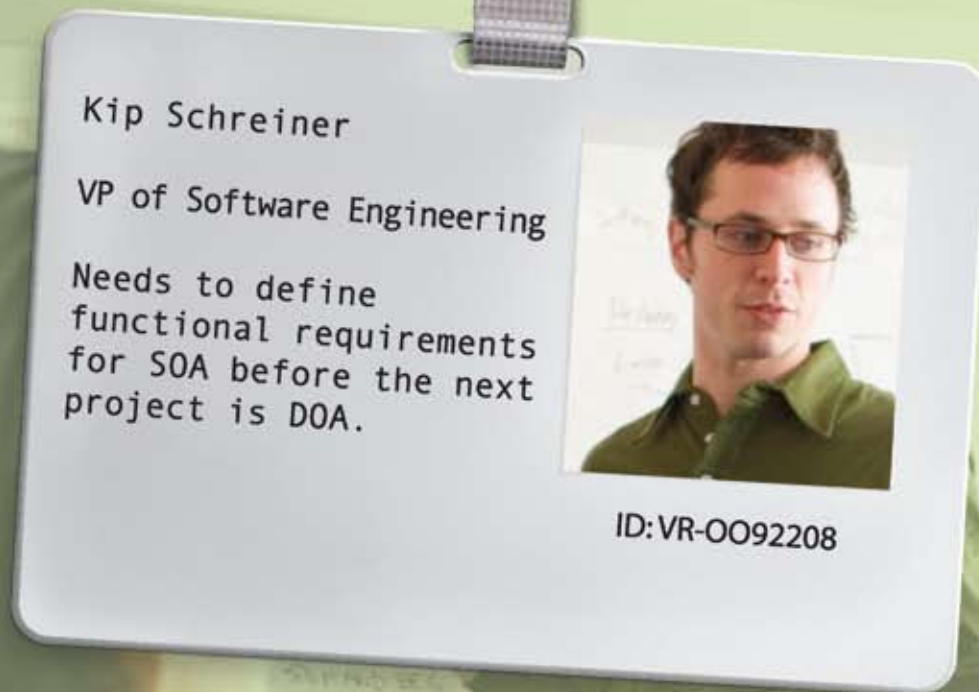
Mike Capaldi

Associate vice president of sales training and leadership development, sanofi-aventis

conference rooms, a 48-seat assessment center, 31 simulation rooms, a creativity center, and a production facility for virtual classroom offerings.

The center allows the company to take training to a new level. For example, Capaldi points out, "It is very awkward for a regional director to observe a sales professional along with a district manager during an actual sales situation, with three people squeezed into a physician's office." The simulation rooms, which are equipped with digital video recording capability, allow trainers to observe trainees in role plays, provide coaching on their performance, and even download video clips to a flash drive for later use. The creativity center is designed to foster creativity and collaborative learning through the use of moveable furniture and magnetic whiteboards.

In the next year, Capaldi and his staff will be evaluating training programs rigorously. "A big component of the continuous learning program is skills-based training," he says. "We are now implementing behavioral change measurement and seeking increased effectiveness. Due to increased salesforce productivity and investment in the learning program, this evaluation is part of being good stewards of the organization." **T+D**



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Joe Toto (left) and Wendy Witterschein have created a teaching culture at BD.

Those Who Lead, Teach

How do eight full-time staff members oversee strategic enterprise learning and development for a company of 27,000 employees? By embracing Noel Tichy's "leader-as-teacher" model. Tichy argues that all leaders must have a "teachable point of view" to develop other leaders. This creates knowledge while simultaneously aligning leaders, teachers, and students around consistent values, philosophies, and practices.

BD, a global medical technology company that manufactures and sells medical devices, instrument systems, and reagents, enthusiastically embraced the leader-as-teacher model about seven years ago. The company's Chairman, President, and CEO Ed Ludwig said, "When we recruit, we definitely want people to know that teaching will be part of their success factor. They will be expected to take time to develop people and to get into a formal training mode."

Since the founding of BD University in 2000 by Ed Betof, chief learning officer and vice president of talent management, its staff have identified and trained nearly 550 leader-teachers across the company's three major segments in the many countries in which it operates. The strategic-level training administered by BDU is disseminated through five colleges: leadership, business skills, sales, career, and operational effectiveness. Leader-teachers are both self-selected and recruited, and can be leaders at any level.

"Our leader-teachers must possess the desire to teach, credibility,

the respect of their employees and peers, and some skills in teaching and facilitation," says Joe Toto, director of leadership development and learning. "They bring unique value to employee development by providing credible information—but they also model and live the process that they're teaching. Further, it's two-way learning, which benefits the leaders because they are exposed to viewpoints they might not otherwise encounter. Although there are certainly practical benefits to the model in terms of cost, it takes a very secondary role to the quality of teaching that it enables us to provide."

BD employees can be involved in teaching as classroom instructors, guest speakers, peer coaches, subject matter experts, or program champions who are responsible for the course content. Ninety percent of the company's leaders participate as instructors or speakers. In a 2004 interview with *T+D*, Ludwig said, "Teaching gives me the opportunity to talk to people about where we are going, about our journey to become a great company. Frankly, I don't think the role of a teacher is

BD (Becton, Dickinson & Company)
Franklin Lakes, New Jersey

optional for a CEO in today's complex, multifunctional, multinational, technology organization. It's part of the job. And it's a fun part."

BD has experienced 27 consecutive quarters of meeting or exceeding expectations and brings in revenues of almost \$6 billion, 50 percent of which are generated outside of the United States. Wendy Witterschein, senior business partner for leadership development and learning, believes that learning and development play critical roles in the company's success.

"Our senior leaders have raised the bar to direct our company into new, higher-value products that will require new and more robust skill sets. To meet that challenge, BDU has engaged more leader-teachers who are affiliated with global product development and are working on the front lines of innovation," she says.

The reach of the BDU staff is extended by 36 core team members—BD employees who, in addition to their regular jobs as business and functional leaders, conduct ongoing needs analyses, select initiatives and solutions, and staff small sub-teams to continuously improve service delivery. The entire group of 44 meets by teleconference every six weeks and in person at a worldwide conference each year.

In addition to the strategic learning and development managed by BDU, hundreds of hours of product and technical training are delivered throughout the highly matrixed organization, in which nearly two-thirds of employees work in manufacturing. Businesses, regions, and functions develop their own programs based on market and associates' needs. The Asia-Pacific region was responsible for developing the program Witterschein cites as the company's most innovative in 2006.

In India, the blood-collection market draws 400 million pints per year, although only 12 percent of the market uses safe blood-collection technology. For BD, the market represents huge potential to upgrade the blood-collection practice to a safe and scientific platform, but sales revenues in

India weren't growing. Sales associates engage with clinicians to sell solutions rather than products, and they were spending a lot of time conducting clinical in-service programs.

Upon investigation, regional learning leaders discovered an enormous turnover among English-speaking nurses in India, many of whom were emigrating for better-paying jobs in the United States and the United Kingdom. This attrition meant that BD sales associates were constantly providing training to inexperienced nurses. In many cases, senior hospital management was unaware of BD's efforts.

Regional training and development staff created a program on the clinical value of safe blood collection and its practice, which included a facilitator guide, participant manuals, and guided practice sessions. Approaching the largest private hospital network in India and the largest private healthcare group in Asia, BD's sales team offered programs to HR executives. Their value proposition was to control the drain of nursing talent by providing education that brings new nurses up to speed quickly. BD employees conducted a pilot program at seven sites and trained 59 trainers to deliver the program.

"Our company helped to improve the hospital group's immersion architecture by applying our proven global company training philosophy, leaders as teachers," says Witterschein, who also notes that quarter-on-quarter growth rates for the India blood-collection market doubled after the introduction of the training program.

Witterschein and her colleagues seek more than return-on-investment in the evaluation of BD training programs. "It's easy to poke holes in ROI calculations," she says, noting that a global project sub-team has been seeking ways for more meaningful and rigorous evaluation that inculcates the company's teachable point of view. As a result, BD has adopted a three-phase approach to evaluation that keeps the learner as the primary focus.

The first phase is about expectations and identifying how

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Wendy Witterschein

Senior business partner for leadership development and learning, BD

learning will be applied before the training program even begins. The second is the program itself. Phase three is about execution and applying the knowledge and skills back on the job as well as identifying their business impact. To improve and facilitate the supervisor's role in creating expectations and measuring impact, BDU plans to increase emphasis on coaching, which will be supported by training and a redesigned performance management process that measures associates' satisfaction with the coaching they receive. **T+D**

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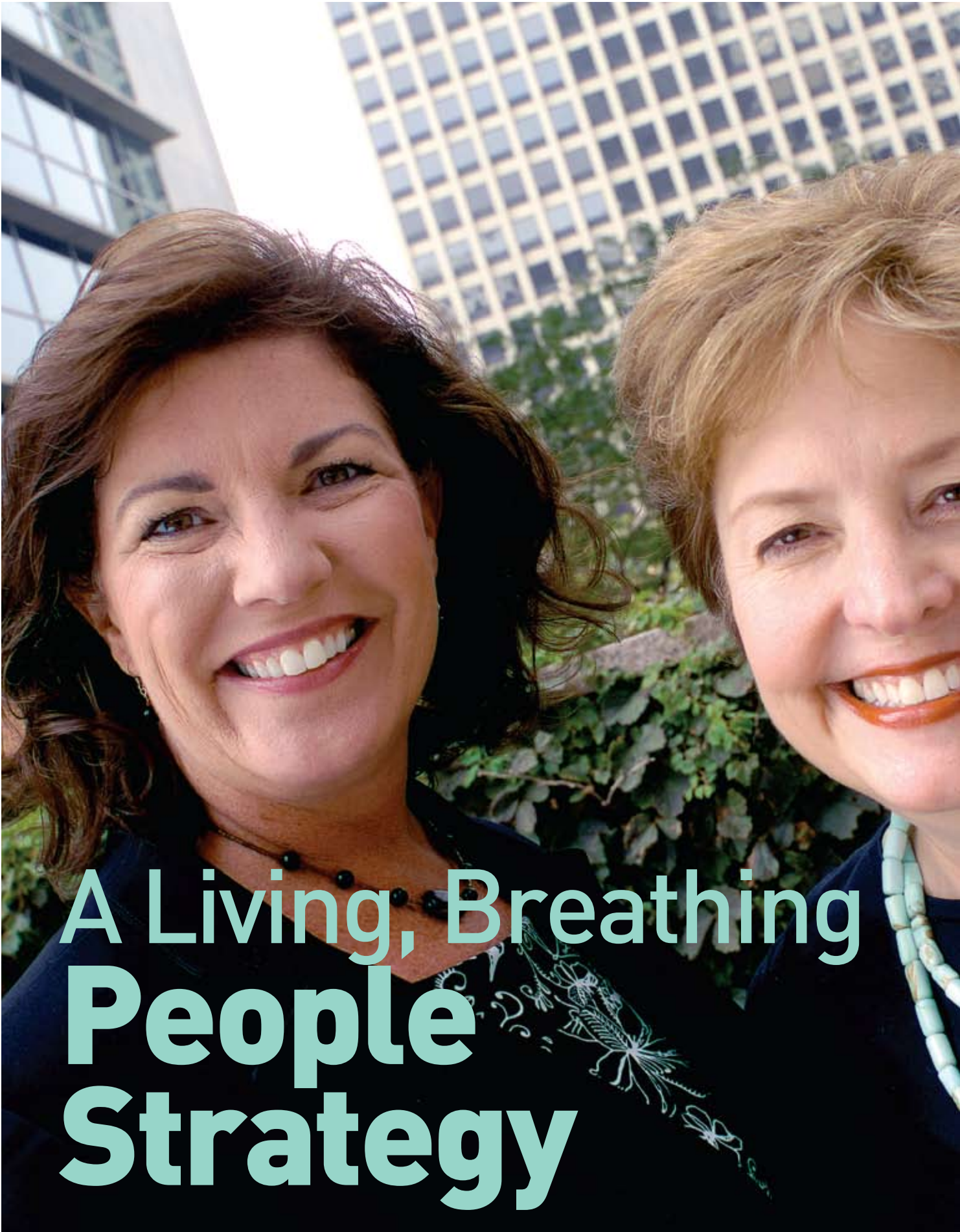
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A Living, Breathing People Strategy



Jennifer Gardner (left) and Kathryn Hal-lenstein have made coaching a common occurrence at Deloitte & Touche USA.

Deloitte & Touche USA LLP New York, New York

The mission of the learning department at Deloitte & Touche USA is “to optimize the power of learning to develop high-potential, high performing talent.” One thing that the company’s workplace learning professionals have realized and leveraged in the past year is that every employee wields the power of learning. The professional services company has implemented an organization-wide coaching initiative that offers every employee the opportunity to coach and be coached, and strives to make informal two-way coaching an everyday occurrence.

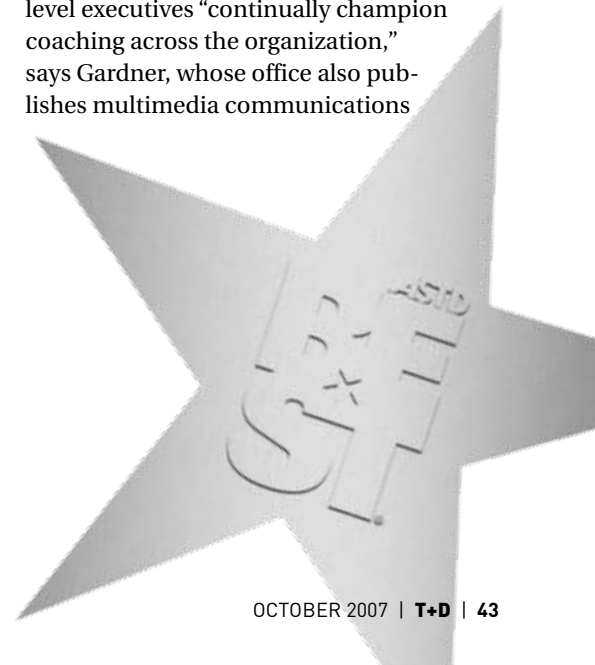
“This program demonstrates our recognition of the unique value of each individual’s perspective and expertise. Thanks to our additions in the past year, it is now a full-scale, comprehensive approach of which we are very proud,” comments Jennifer Gardner, director of national education and development.

The foundation of the coaching initiative is Deloitte’s Coach Approach workshops, which are live, instructor-led classes that explore the coaching framework and emphasize skills practice and application. Both introductory and intermediate courses are offered, and their completion is incorporated into the learning paths for managers and senior managers within the firm.

Next, Coach Approach Transfer sessions permit safe, low-stakes practice in live sessions that include troubleshooting and individual coaching guidance. These are supported and reinforced by an e-learning course that is available to all employees. During the course, participants observe video vignettes that model both positive and negative coaching sessions and challenge them to identify corrective behaviors.

The coaching courses do not exist in a vacuum, however. Deloitte’s new Coaching for Critical Talent services provide confidential individual coaching to support the acceleration of professional development for managers and executives. One-on-one and group coaching services for all employees facilitate career planning and internal mobility.

Support for coaching at the top of the organization is strong. Deloitte’s chairperson, CEO, managing partner, chief people officer, and other top-level executives “continually champion coaching across the organization,” says Gardner, whose office also publishes multimedia communications



that maintain strong visibility for the coaching program.

In the past two years, Deloitte has reevaluated and retooled its people strategy, forming a new corporate philosophy that holds lifelong employee learning as one of its four tenets. The coaching initiative is one way in which the strategy is put into practice. “Our people strategy is a living, breathing part of our organization, and coaching gives employees a real way to experience it,” Gardner says.

“Our employee learning is now more aligned with business objectives and thereby more relevant. We are focusing on application-based training,” notes Kathryn Hallenstein, national e-learning director.

Every employee has an individual learning plan. Deloitte’s Global Excellence Model maps competencies to professional development and links them to performance expectations that include explicit behavioral measures. Since 2005, employees have been held accountable for mandated training; performance ratings and compensation can be negatively affected by noncompliance. In a similar way, managers and partners are compelled to allow their staff to participate in developmental opportunities.

“We want to be a thought leader in the world of learning. During these times of economic fluctuations and global issues affecting business, Deloitte executives have taken a hard look at every aspect of our business. As learning becomes recognized as more important, we are proud to say that Deloitte takes a broad view of learning [as a strategic initiative] and makes smart investments,” says Gardner.

To determine those investments and set priorities, learning and development leaders consult with business function leaders annually to set a direction for learning that will help the company meet its business goals. Learning directors confer with practice leaders to determine key initiatives and strategies for each function, then develop plans and budgets based on the needs identified.

“The resulting prioritized initiatives for the year are approached as a portfolio of investments allocated to the most strategic initiatives. Those investments and learning resources are tied to those initiatives as an integrated budget item,” Gardner explains.

Deloitte employs more than 40,000 people in 90 American cities. The workers’ cultures, locations, and ages challenge and drive the shape and method of many learning solutions, says Hallenstein. “We’ve been looking at the generational differences in learning, and recognize that our employees have different learning styles and strategies. We continually add new processes and approaches to reach them.”

The company cites as its most innovative learning initiative the Cultural Navigator, a package of tools and resources that presents a wide range of intuitive, easy-to-use learning, consulting, and assessment solutions. Elements include a cultural profile tool that allows users to compare their personal profiles with those of other cultures and identify areas of commonality and difference. A cultural simulator tests and reinforces awareness and learning by creating online simulations around a variety of management topics pertaining to a specific country or region.

Aligning with the organization-wide coaching initiative, the exchange is a platform for a suite of cultural coaching solutions. Expert coaches moderate this feature and provide context and quality assurance. Cultural Navigator made its debut in April, and was used by more than 1,000 participants in its first three months.

Live training has its place at Deloitte as well. Because the company hires nearly 10,000 new associates each year, orienting them to the ins and outs of the company is critical. “Onboarding is the first step in a contractual relationship,” notes Hallenstein.

To get new consultants up to speed more quickly, the learning and development team designed a new, high-intensity live simulation that places learners in a close approximation of real work.

“We want to be a thought leader in the world of learning. During these times of economic fluctuations and global issues affecting business, Deloitte executives have taken a hard look at every aspect of our business.”

Jennifer Gardner

Director of national education and development, Deloitte

Participants and coaches play roles that reflect actual responsibilities and challenges of working at a client site while coaches guide teams through the project process and provide skill tutorials based on their own experiences. The simulations are offered quarterly and are reinforced with performance support materials and e-learning modules.

The results are impressive. A consultant who has completed the full learning experience is engaged by clients on average 30 to 40 percent more than those who have not. Each fully trained participant generates approximately \$165,000 in additional revenue annually.

“Learning and development are part of our commitment to employees and clients. I believe that Deloitte is innovative—truly a thought leader in this area. It’s one of the reasons I came to work here,” says Gardner, who has been with the company for 12 years. **T+D**

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Learning That Could Save Lives



Joe Shiposh (left) and Jan Luce have the daunting task of developing training to keep American troops safe on the front lines.

U.S. Army Armament Research Development and Engineering Center

Picatiny Arsenal,
New Jersey

When the United States entered into the current conflicts in Iraq and Afghanistan, the U.S. Armament Research Development and Engineering Center, part of the Department of the Army, faced two daunting tasks: to hire and develop more than 1,000 new scientists and engineers to replace employees eligible for retirement, and to develop new weaponry and technology to support American soldiers in an unconventional war.

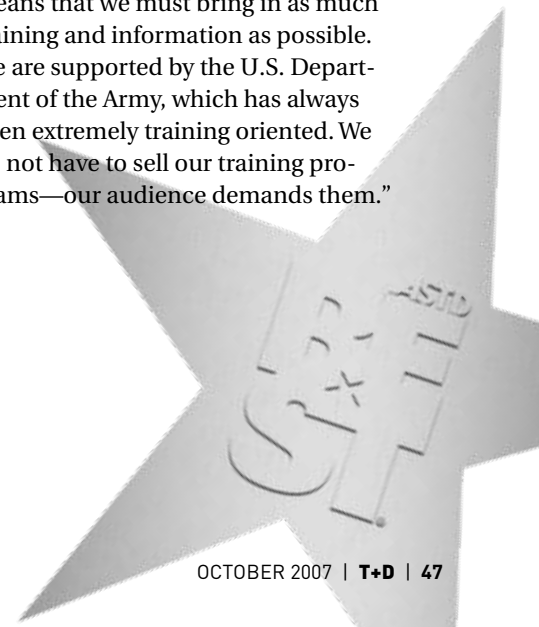
ARDEC provides the technology for more than 90 percent of the Army's weaponry. Every nonnuclear weapon and every ammunition type used by members of the U.S. military have been touched in some way by workers at ARDEC, whose mission is to keep American servicemen and –women alive.

Employees new to ARDEC, regardless of the number of advanced degrees they hold, require significant education and training. It's critical that scientists and engineers understand the deadly environment in which their end users work—and the ways in which military personnel use and adapt their weapons in the field. Although visits to weapons production facilities and briefings with returning combat teams conveyed some of that information, it was still received at a distance.

In a groundbreaking initiative, ARDEC integrated a progressive and sequential Greening Program into its onboarding process. Prepared by comprehensive instruction on ammunition, explosives, and weapons, scientists and engineers participate in simulated combat operations at the National Desert Training Center in California and at Fort Benning, Georgia. There they participate in war games, live-fire operations, and equipment and technology discussions with

combat veterans. Upon their return to field headquarters, they participate in a review with combat commanders, and compile an extensive technical report for dissemination to other military research and engineering centers. When they return to work, these scientists and engineers translate their new knowledge into design considerations and product improvements, by increasing maintainability, reliability, and performance—and ultimately saving soldiers' lives.

ARDEC has demonstrated a strong commitment to employee learning and development since the early 1980s, according to Joe Shiposh, ARDEC's chief learning officer. "Our research and development mission here means that we must bring in as much training and information as possible. We are supported by the U.S. Department of the Army, which has always been extremely training oriented. We do not have to sell our training programs—our audience demands them."



Six full-time and five part-time staff design and deliver human capital initiatives for ARDEC's 3,000 employees under the auspices of Armament University and more than 50 unit administrators who help with outreach, support, and instruction. ARDEC's director and chief scientist is Joseph Lannon, who is an ardent supporter of employee development and frequently participates as a speaker at learning events.

Armament University uses four-corner methodology that is both competency- and commodity-driven, explains Jan Luce, training program manager. Career paths, individual development plans, soldier requirements, evolving technology, and other factors play a role in determining learning needs. ARDEC has a decentralized learning budget in which the university charges business units for employee development. In competition with external sources for learning dollars, ensuring customer satisfaction is critical for the online university.

The four-corner model ensures that learning and performance are linked directly to the organization's mission. "Our choices incorporate and reflect our vision for the future—critical mission development areas as well as workforce needs—to assure our continued viability," says Shiposh.

Operating in the New York metropolitan area and requiring specific and rare education and experience from its workers, ARDEC faces significant recruitment and retention challenges. Employee satisfaction and engagement are highly valued and conscientiously sought. "We bring in generic engineers and academics and provide them with highly specialized education and training," says Luce, who notes that ARDEC spends \$4 million per year on outside graduate studies alone. "We want them to find a home here, and to stay for the long haul."

ARDEC's 2006 hiring boom brought an opportunity to track and study a large group of new employees. Armament University established a process called "cohort studies" to identify successes and problem areas in the

newly hired workforce. Through surveys, focus groups, and other means, new employees are asked to report on their assimilation into and satisfaction with ARDEC. Participation rates are more than 90 percent. One outcome includes a redesigned orientation program that is dedicated to making an employee's first 180 days on the job a positive experience. Support materials include a new handbook, training, and an improved welcome package.

Employees' individual development plans—a formal expression of their career goals and aspirations—also inform the four-corner model. Developed jointly by employees and their supervisors, the plans highlight competency areas for development or improvement and help to drive a closed-loop performance-management process composed of four critical elements: goal setting, talent review, workforce development, and performance evaluation. Together, these inputs help university staff formulate operational objectives and drive engineering projects, each with specific talent requirements. An overarching annual master learning plan translates learning needs into curricula, workshops, and project assignments.

ARDEC's implementation of Six Sigma methodology has significantly contributed to workforce development, driving a major cultural change and the continuous strategic improvement of the organization. Although the university outsources some learning design, development, and administration, the Lean Six Sigma program was brought in-house after the phenomenal success of the pilot program in 2005. The LSS Green Belt curriculum is now offered in two tracks for both technical and business applications, and a Six Sigma business unit provides instruction and technical consultation on projects. By using internal master black belt instructors, program costs were cut by one-third.

"Our resident faculty better understands our unique mission and our corporate history, and allows us to plan and publicize annual LSS learning schedules so that participants can

"We are supported by the U.S. Department of the Army, which has always been extremely training oriented. We do not have to sell our training programs—our audience demands them."

Joe Shiposh

Chief learning officer, ARDEC

identify and refine their projects," says Shiposh. Participants in the green and black belt programs work in teams to prepare work-related process improvement projects in class. Upon completion of the instructional phase, the teams continue to work on their projects until they are ready to present to the Six Sigma review board, which includes members of an external certifying agency.

"Internal faculty also gives us the flexibility to provide an environment of free discussion without concern for confidentiality, classified subjects, or proprietary information," Shiposh continues.

The LSS Board monitored more than 100 active projects in fiscal year 2006. Savings generated by each LSS project are used to calculate the return-on-investment of the overall program. Shiposh estimates hard savings will exceed \$7 million for 2006.

"Through the hands-on projects, we reinforce the intense learning process and directly link cost savings, increased effectiveness, and our ability to deploy quality equipment rapidly to our nation's defense." **T+D**



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Ron Gjerde implemented a new way of doing business.



Learning on the Rise as the Company Grows

When Equity Residential completed the rollout of its new, integrated business information system in 2006, virtually all of the 4,000 employees at the company's more than 600 apartment properties had to learn how to use it.

This included sales, housekeeping, and maintenance staff who may not have used a computer in their jobs. The new system incorporated property management, unit pricing, and procurement functions, and is used for everything from completing a lease to ordering a gallon of paint. Further, reducing time to employee readiness was critical.

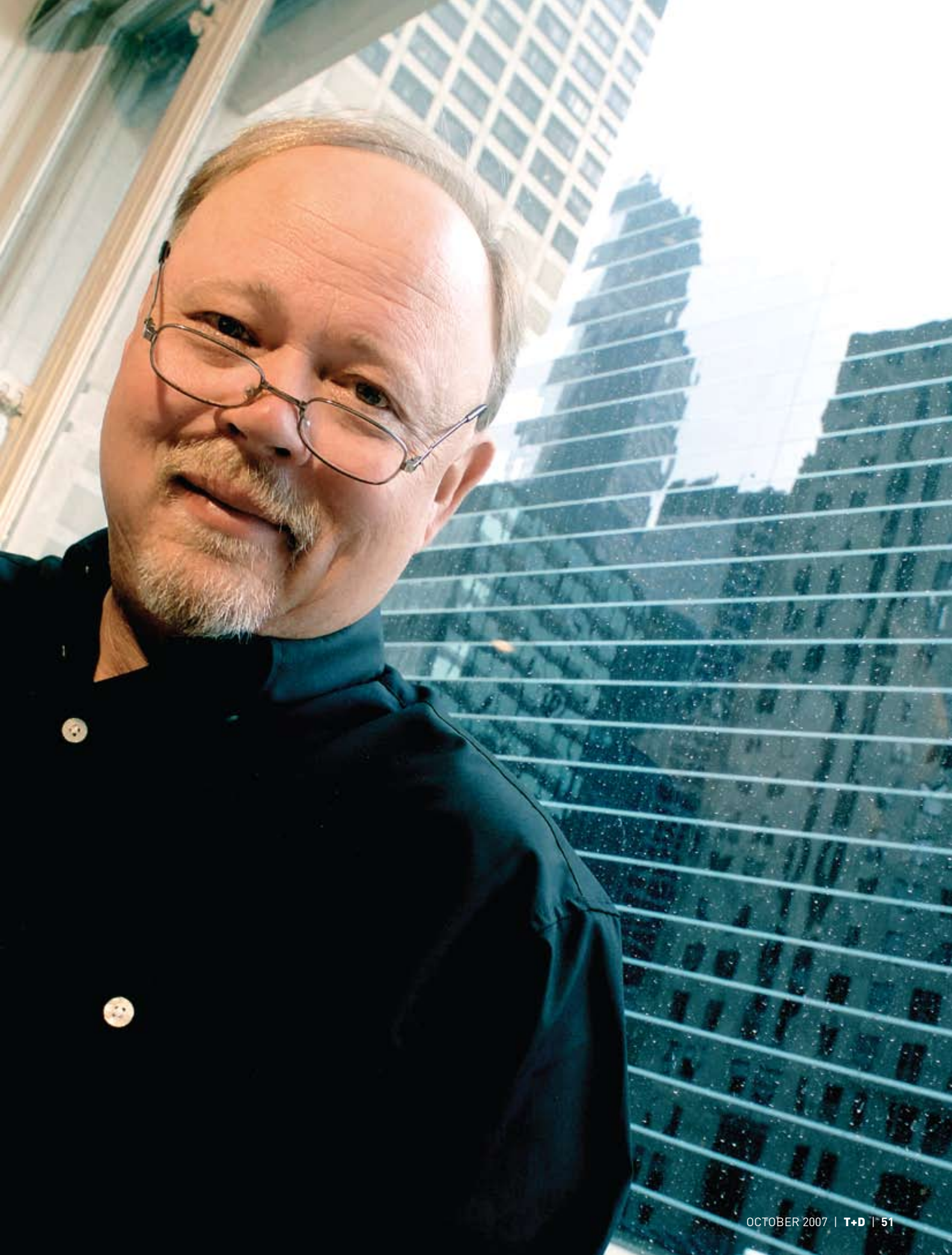
Equity's national education group, working in Dallas under the leadership of Tony Pusateri, senior vice president for education, designed a phased approach that would teach or remediate the computer skills of employees who needed them without holding back workers who were more comfortable using a keyboard and mouse. An online assessment was created to determine the learner's skill level, so an online training program could be constructed for areas where there were deficiencies. The resulting program, customized to each employ-

ee, could take a few minutes to several hours to complete.

The second phase consisted of training on the new proprietary business information system. Pusateri hired 15 new operational support trainers and deployed them across the country with new mobile training labs. These labs included 12 laptop computers and peripherals packed in a specially constructed shipping crate from which they can be unpacked and set up in any conference room in less than 30 minutes.

This training effort broadened the impact of learning across the company not only because it touched so many employees in so many roles, says Ron Gjerde, vice president for organizational development, but also because "implementing the new system represented a fundamental change in the way we do business. We had been using our previous system for many years, so naturally we encountered

Equity Residential
Chicago, Illinois



some resistance. But although the training was actually a small part of the system implementation, the success of the training was key to the success of the implementation and allowed the new system to have its impact.”

A seat at the table ensures that learning initiatives are aligned with corporate strategy. Equity Residential's chief human capital officer serves on the company's executive committee, and the organizational development group facilitates the meetings. Members of the educational staff also serve as leaders or members of various task forces and committees. “Nothing goes on here that we aren't involved in—we're there from the beginning,” says Gjerde.

Gjerde's unit also is responsible for the company's performance management and succession management processes. Competencies have been or are currently being defined for 100 percent of jobs, and 50 percent of employees have individual development plans, which are tied to performance objectives and competency model requirements. Learning staff review the plans and map the development needs to existing curricula, using that process to identify gaps in offerings.

When Pusateri joined Equity Residential in 1997, the company offered four courses. Ten years later, employees can choose from more than 70 courses. Employees completed more than 60,000 student sessions last year. Corporate learning is affected by two large external trends: the increased professionalization of property management as a career and the slow rate at which colleges and universities have unveiled degree programs in property management. Therefore, Equity and its competitors must provide much of their own education for employees, of whom only 15 percent hold college degrees.

Along with the industry, Equity Residential has experienced dynamic growth over the past three to four years. Since going public, the company has grown from having 22,000 apartment units in its portfolio to more than 160,000 units in 35 major markets across the United States. Executives clearly recognize that the key to the company's

success is its people. “Our service—and our success—depend on our people. We continue to provide the structure, training, and support they need to achieve their best,” writes CEO David Neithercut in his 2006 annual report.

“Our company leadership has felt the absolute need to attract the best possible people, educate them to do business, and develop internal leadership,” says Pusateri, who notes that more than 650 employees have participated in leadership development courses over the past several years. A pivotal decision to concentrate on organizational development led to the creation of Gjerde's department, which spearheaded the process to create a competency description.

High turnover has long plagued the property management industry, and Equity has attacked the problem head-on through the leadership development program and employee engagement initiatives.

“People don't leave companies, they leave managers,” says Gjerde, who has ensured that leadership development offerings have been opened up to any of the company's employees who manage others.

Equity's employee engagement score in 2003 was 68 percent. By targeting employee recognition, career development, team building, and compensation, the company increased its scores to 79 percent in 2005. Particularly effective were a new, frank attitude toward compensation and a new performance management website that allows employees to engage in candid conversations about compensation and plan career development moves. By 2006, engagement scores had reached 83 percent, and turnover had dropped 19 percent from 2004.

Despite Equity's recent success with integrated business systems and leadership development, the nature of its business requires diverse offerings for many types of employees. Maintenance and repair of the company's 160,000 apartment units is a critical function of its business with 1,700 people employed in maintenance alone. Four full-time maintenance education trainers

“We're looking at our courses in light of generational needs and respecting our employees' computer literacy. Further, we're trying to make sure that every piece of information that's included is absolutely necessary.”

Tony Pusateri

Senior vice president for education,
Equity Residential

teach and manage field trainers. In this area, hands-on training is conducted in vacant apartment units and maintenance training labs using appliances, electrical systems, and heating, ventilation, and air-conditioning equipment set up for demonstrations, as well as computer-based simulations.

Exceptional Make-Ready maintenance training is a program designed to reduce the number of defects in an apartment when new residents move in. Since its implementation, move-in service requests have declined by 5 percent, which has resulted in savings of 67,500 staff hours.

In the coming year, Pusateri plans a comprehensive review of all corporate educational offerings. “We are questioning ourselves and everything that we do in terms of efficiency,” he says. “We're looking at our courses in light of generational needs and respecting our employees' computer literacy. Further, we're trying to make sure that every piece of information that's included is absolutely necessary.” **T+D**

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Dean Williams integrates learning into one performance management system.

Paving the Path to Performance Management



A recent survey by OnPoint Consulting found that less than half of HR professionals believe that their performance management systems add value to the business while only 30 percent believe that the systems achieve the desired objectives. Clearly, many American businesses are going to be replacing or radically altering their performance management systems in the coming years. If so, they can look toward the experience of Wachovia as an integration success story.

Two years ago, when Dean Williams was hired as Wachovia's first chief learning officer, he and the company's leadership resources group were asked to look at the approach that the financial institution took toward employee learning and development, particularly the learning management and performance management systems. What the team found was that different types of employee performance, compensation, and learning information were being stored in various formats and systems. For example, the learning management system (LMS) permitted employees to enroll in a variety of training programs but, because the employee performance process was largely paper based, there was no linkage between an employee's developmental goals and her options or attempts to meet those goals.

"This approach was not only cumbersome and time consuming for managers but also very confusing for employees," says Williams.

In February 2006, Wachovia acquired a new performance management system and integrated it with the existing LMS. This permitted the bank to use a single learning platform and integrate it with a single performance management system, thereby providing employees with easier access to the tools they need to be successful in their jobs. With a single login, employees and their managers now have access to goals, competencies, and planned developmental activities, as well as the ability to search for and track learning activities housed in the LMS. The new system has resulted not only in time savings and clearer links between

Wachovia
Charlotte, North Carolina

learning and performance, but also in improved measurement of learning's impact and greater visibility into the organization's talent pool for Williams and his staff.

Learning and development at Wachovia have adopted what Williams describes as an "embedded hybrid model." This means that workplace learning professionals sit within their business partner teams but employ centralized infrastructure and reporting systems. "This allows them to see the uniqueness of the various lines of business while reaching back to what's common across the enterprise," Williams explains.

To select learning and performance initiatives, the organization uses an intake and prioritization model called "triage" when requests come in from the lines of business. The triage process is a forum that allows workplace learning professionals to partner with other key functions—such as the desktop and application support team or business operations—to define early requirements for new requests. The learning organization facilitates the process so that sponsors can present their needs and then answer questions from the triage forum.

"Enforcement of this process allows for a quicker assessment of needs and a better understanding of key partner accountabilities and potential solutions," Williams says. "It can allow the early discovery of significant risks, resource constraints, or even the discovery that a learning intervention is not the appropriate solution."

Many learning solutions at Wachovia are designed in partnership with the business units. One of the organization's most innovative learning initiatives of the past year was developed for employees in the internal audit division. The Welcome to the Jungle! program leveraged a visual learning map that combines metaphors, activities, games, hands-on skills practice, and participants' own experiences to teach and reinforce audit concepts. Department leaders, serving as course facilitators, team with participants to embark on a journey through the "jungle" that includes games, quiz-

zes, and role plays in a highly interactive learning experience. Participants are encouraged to share examples of learning points.

Course prerequisites include several web-based training courses that present foundational concepts and provide simulated practice in audit methodology and database tools. Following completion of the Jungle course, participants practice their new skills with their managers and receive coaching and feedback. Internal audits now are conducted on time, and a majority comes in under budget. An additional bonus is that turnover within the department has been reduced.

"Our corporate philosophy is that learning helps us achieve our business goals as we seek to recruit, engage, and retain a qualified workforce. Yet our overall priority is to achieve the company's business priorities," says Williams, who admits that learning and development are still viewed as a cost center. "Our long-term goal is to create a stronger view of learning and development as an investment."

In 2006, Wachovia migrated to a new investment review process that approved and monitored investments more rigorously. The new process rationalized individual project investments throughout the organization at a portfolio level within and across business units. Learning and development staff served on the cross-organizational team that conceived, designed, and launched a next-generation process for making more effective investment decisions at both the business unit and enterprise level. In its first year, the team reduced approvals of new investments by \$1.7 billion while simultaneously improving the profit and loss impact of 60 approved projects by \$189 million. The collective portfolio enjoyed a rate of return of nearly 20 percent.

There were also qualitative benefits to the project, including raising decision makers' willingness to challenge potential investment projects, increasing awareness of the importance of investment decisions, and enhancing those decisions

"As we continue to improve this process, we remain focused on the behaviors that we believe are crucial to driving success. We seek to maximize rigor and discipline by involving key partners in the screening and evaluation of investment options."

Dean Williams

Chief learning officer, Wachovia

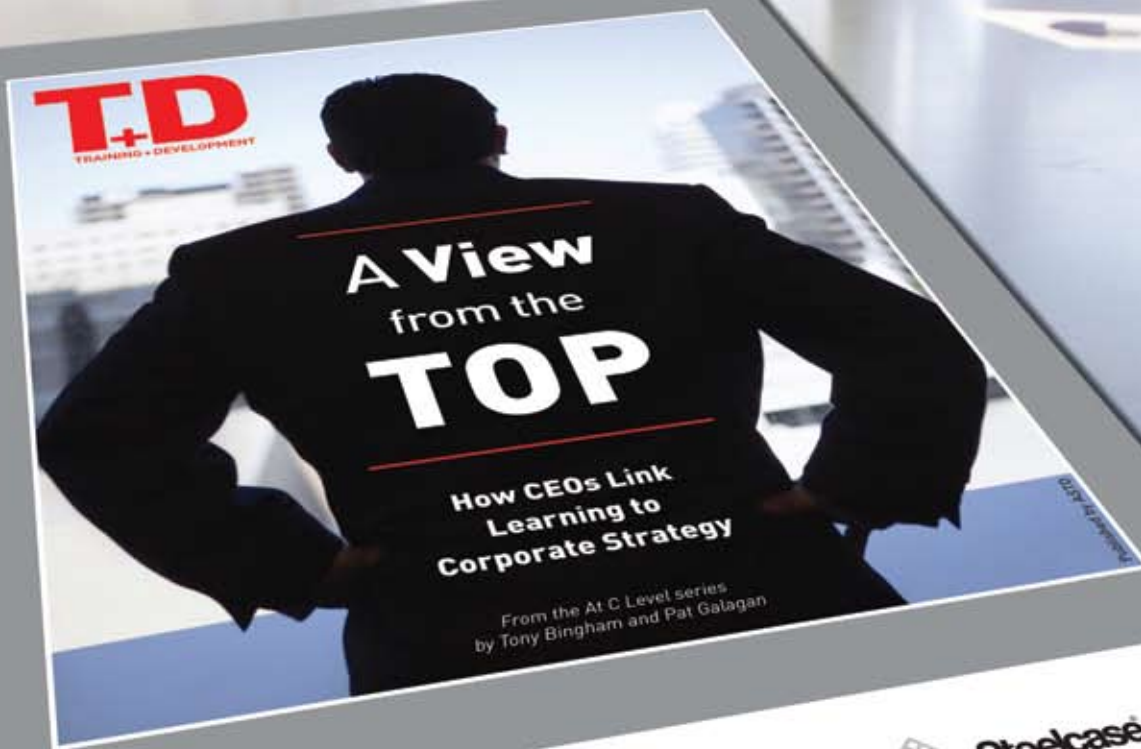
by creating and implementing a structure, process, and guidelines to evaluate investment possibilities.

"As we continue to improve this process, we remain focused on the behaviors that we believe are crucial to driving success. We seek to maximize rigor and discipline by involving key partners in the screening and evaluation of investment options," says Williams.

As Wachovia's first CLO, Williams was told that learning and development needed an enterprise-wide, strategic focus that would help to create influence in the lines of business. Learning solutions such as the internal audit course, coupled with nonlearning initiatives such as the new investment-review process, help to underscore the relevance of learning and development to business success. **T+D**

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Chief Learning Officer Leslie Joyce takes learning to new heights at The Home Depot.



Walking in the Customers' Shoes

A typical Home Depot store holds about 40,000 products. Because many of these products, for promotional or seasonal reasons, have short shelf lives, training employees on their characteristics and customer benefits must be completed promptly. To increase the consistency of content and decrease content development costs, the company partners with its suppliers to design and deliver product training.

This training is delivered through the company's rapid web-based training model, a video-driven e-learning experience that consists of 15 minutes of video and synchronized text, followed by an assessment. To keep production costs low and to keep the language as natural as possible, there are no scripts for video production, and the segments are produced in the company's in-house studio. Templates and streamlined production processes allow for replication and further reduce costs.

In developing the model, the learning team conducted a controlled

study in which content modules were developed for products at three different price points. The training was delivered to stores in varying locations, and results were compared to a carefully selected group of control stores. Taking into account historical sales trends, product penetration, and year-to-year gains, trainers found significant improvement in sales of all three products. Six weeks after the training, the \$100 product line showed a 19 percent increase; the \$500 to \$800 product line was up by 29 percent; and the \$1,200 product line showed a 50 percent increase.

The Home Depot
Atlanta, Georgia

Product training doesn't occur in a vacuum but as part of a carefully planned curriculum that surrounds the development of all Home Depot employees. The company offers customized position-based curricula to approximately 83 percent of store associates. Each curriculum lists the minimum amount of classes required for each associate. Associates must complete the classes on a scheduled monthly basis to become effective in their positions. This approach, as well as the company's philosophy about hiring, represents a sea change over the past several years.

Leslie Joyce became Home Depot's first chief learning officer in 2004. "I was clearly directed to take learning to the next level. What that means is that we wanted to create formality and discipline in the process while optimizing informal learning," she says. Learning and development became a centralized function with decentralized deployment resources.

The company has transitioned through several phases of philosophy regarding the kinds of people it should hire. In the early days, many store associates were accomplished do-it-yourself types, from hobbyists to experts. As the company grew, talent pools of experienced candidates decreased, customer satisfaction ratings declined, and stores began to "hire for attitude and train for skill," as the company sought a stronger service orientation, Joyce explains. Now, the approach has settled into a sort of middle ground, where the company seeks a solid mix of people who are service-oriented as well as home-improvement hobbyists or seasoned professionals—a specialized requirement that Joyce admits is far more difficult to find.

Improved customer service remains crucial for the organization, which suffered in the ratings for several years at the hands of its competitors. Joyce and her staff were involved in the design and implementation of the company-wide Customers First initiative in 2006, which was aimed at making customer service the first priority of the stores.

"There was a clear recognition of the need for improvement on the very front lines of the company," says Joyce, whose team had already designed leadership essentials and team essentials programs; customer essentials were the next logical step.

"Customer essentials are a group of specific behaviors linked to actions that guide associates to provide service that puts customers first," she says. "We wanted to surround the problem and expressly define what good customer service looks like. The essentials create a common language and provide store leaders with a yardstick to measure and coach for customer service."

The learning organization developed a learning map, which new associates receive on their first day of orientation. It illustrates customers' shopping journeys through the store by putting associates in customers' shoes. Participants interact with each other to form responses to hypothetical customer questions. In 2006, more than 100,000 new hires went through the orientation.

In a third component, the learning organization partnered with the customer service team to design action meetings, eight-hour sessions offered across divisions to share best practices and improve customer satisfaction results. In the six months following the meetings, "likely to recommend" ratings by customers increased in every division.

The company recognizes that leaders are crucial to ensuring and inspiring the learning and performance of its 364,000 employees. Although previous leadership development initiatives had focused on motivation and alignment, a new program launched in 2006 targeted learning as a key to business success. The new leadership learning forums educated 3,500 high performing leaders across the organization in three-day conferences that included presentations by senior leaders, workshops, simulations, competitive analyses, and leadership challenges. One innovative activity in an asset-protection workshop had participants

"Using leaders as teachers, we were able to create a rich sensory environment that engaged learners and allowed them to interact with senior leaders to whom they normally wouldn't have that kind of access."

Leslie Joyce

Chief learning officer, The Home Depot

playing a game in which they were the game pieces. In another session, as the audience watched a video case study, they used voting machines to help a fictional character choose the best ways to improve his financial reports.

"The responsibilities of leaders within Home Depot have changed over the past couple of years," says Joyce. "We now focus on discipline, accountability, and employee engagement as being key to getting results. Although it is very unusual for us to produce such a large, in-person learning event, the commitment and agenda for the leadership learning forums came directly from our CEO and senior leadership team. Using leaders as teachers, we were able to create a rich sensory environment that engaged learners and allowed them to interact with senior leaders to whom they normally wouldn't have that kind of access." **T+D**

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**Tata Consultancy
Services Limited**
Mumbai, India

There is beauty and elegance in simplicity. Case in point: Experience Certainty, Tata Consultancy Services's solution to a pressing business problem. Asia's largest software consultancy needed to provide quick and effective training on software updates to support and maintenance associates around the world. There were several factors that complicated the delivery of the training.

The knowledge to be imparted to associates was incremental, which made a full-scale training program impractical. Because the target audience worked in shifts, it was impossible to gather them together for training. In addition, the trainers themselves were associates working on the same engagement and operating under the same time and deadline constraints.

"While designing the solution, we also took some of the socio-cultural aspects of learning in our organization into consideration," says Sowmyanarayanan Sampathkumar, senior consultant of strategic initiatives and special projects in the company's learning and development department. "Although we support a multigenerational, technologically savvy workforce, we realize that in training, a personal

touch plays an important part in addition to technology. Some ideas are best conveyed through an approach that combines the benefits of both."

For the training on software updates, the learning and development team assisted the projects group in crafting a solution that combines the best of both worlds by creating small training snippets without going through the time-consuming process of storyboarding, scripting, and multiple production steps. The team used a software tool to capture the necessary operations to be trained, and then composed simple, clear instructions to accompany the screen sequence.

Trainers recorded voice-over audio of the instructions, which were incorporated as synchronized narratives. The finished product was then placed on the web server so the target audience can access it easily, anywhere and anytime. This simple process was followed for each update when it became available, and small add-on recordings were prepared for any modifications that arose.

Emails announcing the training updates alert associates to start their individual training sessions within a specified time. A tracking feature allows the learning and development team to monitor completion and send automated reminders to associates who haven't completed the training.

Sowmyanarayanan Sampathkumar (left) and Vidyut Navelkar (right) designed training solutions with the help of K. Ganesan, global head of learning and development for Tata.



Simple Is Beautiful



There are numerous benefits to this approach, says Sampathkumar. To begin, only elementary knowledge of the program is needed to leverage the tool. Training material is created quickly and cost-effectively, with consistent content. The recordings can be replayed any number of times to eliminate the need for multiple training sessions. Further, Sampathkumar believes, "The voice-over portion gives the training immediacy." Through the use of this simple solution, trainers can achieve 100 percent coverage with 100 percent effectiveness.

Two years ago, the learning and development team drafted a new mission statement that reflected its strategic role in the company, says Vidyut Navelkar, head of the Global Continuous Learning Program. The statement reads, in part: "Our mission is to enhance the competency capital of Tata Consultancy Services, through the co-creation of learning experiences continuously and consistently."

The term "co-creation" is important. Although company leadership has always been committed to every associate's learning, that commitment has become stronger as the company has grown to its current size of 93,000 associates. "The mission statement exemplifies our conscious move away from learning and development as a support function. Now we are positioned as partners, and work closely with the business at every level to enhance our competency capital," Navelkar says.

One way the company strives to do that is through knowledge sharing. The learning team has found that to elicit, codify, and communicate associates' tacit knowledge is a difficult and time-consuming task. In 2006, seeking a way to share innovations in large-project delivery, the learning team sought a new approach. Bring Three, Take 30 is a two-day conference for a maximum of 10 participants. It adopts a "share-and-learn" platform to showcase and transfer technological and management expertise among large projects.

"In our business, one of the biggest challenges is that great innovations

remain in pockets, but sharing them is key to the company's growth and success," says Sampathkumar. The conference was planned and orchestrated over an extended period. Participants prepared formal presentations, the notes for which were circulated in advance. "In that way, the conference itself could be used for networking and informal conversation as participants assimilated nuances while looking for commonalities," he says. Each of the participants went home with 30 new ideas, and a dedicated portal, Know-Max, provides access to materials after the event.

Benefits to the business were unassailable. In one example, the expertise acquired in a client-supplied product was leveraged to form a full-fledged Center of Excellence within the company. The knowledge and expertise accumulated within the center allowed the company to win a major, multi-million-dollar contract.

"We try to leverage peer-to-peer learning as much as possible," Navelkar explains. "While the usual understanding of that is of one-to-one, we have succeeded in converting the model to one-to-many and many-to-many," he says. "The Center of Excellence is a clear example of that."

A significant challenge for the business is keeping all of that knowledge and expertise within the company. Learning's impact on the company's ability to retain essential employees is a metric that is carefully measured. In particular, the company sought to retain middle managers with six to 11 years of experience. "These professionals, who are much sought after by our competitors, provide a crucial link for us between employees and clients. They are project, group, and module leaders, and are actively looking to enhance their own performance opportunities," Sampathkumar says.

Tata Consultancy sought to address attrition among this population proactively, before turnover became unacceptably high. The company instituted a retention strategy that addresses compensation, job enrichment, loyalty building, and

"The company instituted a retention strategy that addresses compensation, job enrichment, loyalty building, and career and personal growth."

Vidyut Navelkar

Head of the Global Continuous Learning Program, Tata

career and personal growth. One of its most innovative solutions was to create mobile certification camps that address the geographic diversity of employees and the fact that information technology skills can become obsolete very quickly. Professional certifications are very important to this group, and the new program brought training and exams directly to employees. "It's certification at your doorstep," says Navelkar.

Cross-cultural and cultural diversity training also equip targeted employees to work in new areas and establish centers of excellence in other countries. "We constantly rotate people across roles and geographies," says Sampathkumar, who notes that learning and development executives operate from locations across the globe. He and Navelkar cite the continuing globalization of learning as the next big challenge for workplace learning at the company.

"We seek to provide learning that is universal, not uniform," says Sampathkumar. **T+D**

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CHECKFREE SERVICES INC.

Within its five divisions, CheckFree discovered that there were multiple best practices around performance management. However, those practices were not being leveraged or trained across divisions.

"We had been doing a great job of teaching our leaders about leadership but never gave them training on how to be better people managers," says Linette Hillis, director of learning and organizational development at the Atlanta-based firm that provides financial e-commerce services and products. The company, which acquired two large businesses in 2007, sought a universal process for dealing with corrective action, performance reviews, recruiting, interviewing, and other managerial tasks.

To that end, the company's training and organizational development team partnered with human resources to develop the five-course people management training curriculum. A blend of classroom instruction and e-learning, the mandatory program teaches managers skills for setting expectations, handling conduct situations, and adopting behavioral-based interviewing.

CheckFree's growth and commitment to training are anything but ordinary. In 1981, CEO Pete J. Kight founded the company in his grandmother's basement. Now, it has 3,600 employees and annual revenues of \$973 million.

That evolution underscores one of the firm's core beliefs: Progressive learning requires executive involvement. Kight teaches a portion of the company's annual Energy of Leadership course, which helps high-potential leaders identify and develop their core strengths as revealed by 360-degree appraisals, personality assessments, and performance reviews. The course also helps these leaders overcome their weaknesses and understand the need to tie corporate goals to training initiatives. Each participant in the role-playing class follows a robust, monitored individual development plan after the two-day course ends.

Recognizing and managing talent is an overriding mission at CheckFree, which also launched a 12- to 18-month developmental roadmap for new supervisors. Focusing on HR and leadership responsibilities, the program includes an orientation delivered by colleagues and training leaders, just-in-time training, and mentoring by executive coaches.

Managers aren't the only ones who benefit from CheckFree's focus on employee development. The firm's customer support team at its three-shift technical assistance center in Atlanta recently received customer satisfaction scores that ranged between 50 and 60 percent. A senior consultant from the learning team spent a week observing and interviewing customer support associates, then customized a training program that utilized new communication and listening techniques. The program helped employees recognize how personal beliefs often affect customer interactions. Soon after, customer satisfaction scores reached 85 percent.

Another recent CheckFree learning initiative, Customer Solutions University, is an intense, weeklong, experiential program that enables the customer-solutions leadership team and other participants to employ more strategic decision making instead of focusing on day-to-day tactics. At its conclusion, employees create and implement individual development plans that align with the company's three-year growth plan.

Each CheckFree associate's demonstration of the firm's core values and learning competencies accounts for half of the overall score on her annual performance appraisal, which determines salary increases and is a central focus of the organization's succession-planning process. "Our learning is integrated and embedded, rather than just being singular events," Hillis says. "Each person is responsible for taking action to improve themselves and the company, and our team is committed and driven to helping everyone do just that."

AIR PRODUCTS AND CHEMICALS

Using a new strategic direction called Deliver the Difference, Air Products began implementing a comprehensive change program. Its aim was to align the company into a process-oriented enterprise that is focused on growth through the active management of its business portfolio and the use of consistent processes across the organization.

When Deliver the Difference was launched, Air Products's sales were \$5 billion. Since then, that number has doubled to \$10 billion as the company has been reshaped into an enterprise that operates in more than 40 countries around the globe.

As part of the initiative, leaders pledged to participate personally in leading the effort to instill continuous improvement as a basic corporate value and to promote new ideas and introduce a formal process for turning ideas into action. The executive team participated in a continuous improvement workshop that was conducted in a blended-learning environment.

A select group was trained in continuous improvement processes that blended Six Sigma methodology with Lean techniques. In 2006 more than 1,000 continuous improvement projects were completed, and leaders claimed impressive results from their learning. Fifty percent reported that the training had a direct influence on their job; 90 percent believed it increased productivity. In addition, a two-day learning simulation called "discovery-driven planning" was held for executives who met with individuals from the University of Pennsylvania's Wharton School and Columbia University.

These recent initiatives are building upon the company's ambition to become a recognized learning organization. The company's virtual university is now available in 40 countries and connects 18,000 people.

ALLIANCE DATA

At Alliance Data, each associate adds value to the company. Therefore, this provider of credit and marketing solutions strives to enrich its associates' careers by offering them career development and learning opportunities as well as rewards and recognition.

In the past year, the company has implemented several initiatives to reinforce this philosophy. In 2006, it launched a second version of the Leadership Academy program, which features leader-to-leader education. Fifty percent of the program's content is facilitated by company executives, who lead discussions on everything from company strategy to the business scorecard and goal execution.

Alliance Data also has improved leadership effectiveness by measuring leaders' capabilities through a 360-degree feedback process. With this feedback, company leaders create individual development plans for themselves, share them with those who provided them feedback, and measure their own progress through follow-up feedback, coaching, and mentoring.

In addition, a new performance and talent management process with accompanying technology was incorporated last year. This process helps to clearly define talent requirements for business, evaluate associates' leadership skills and performance, and conduct workforce planning.

Rounding out these programs was a major cultural change for the company—a switch to a pay-for-performance philosophy. By rewarding top performers for their achievements and contributions to company goals, Alliance Data showed its workforce that it is serious about its leadership development initiatives. The response to these programs has been positive.

AMERICAN HOME SHIELD CORPORATION

The home warranty company had to modify more than 200 of its products because of updated federal regulations on energy efficiency. For the first time in a decade, the organization had to educate all of its associates about complex product changes. The learning and development team was a crucial partner in designing a companywide plan that entailed design and delivery of corporate messaging, process design, and information sharing.

The team employed a blended learning strategy, which included instructor-led training for 2,000 associates, a two-week "road show" to educate 200 field associates, and an online course, which also served as a way to measure learning and retention. A total of 1,145 associates passed the online course with an average score of 91 percent.

To better illustrate complicated business processes, the learning and development team worked with a vendor to produce a cohesive method for communicating, educating, and branding. This method, which combined graphics with information to tell a story about the business goal, helped translate regulations into lay terms for audiences inside and outside of the organization. It increased activity on the company's website, offered clarity and understanding as customers purchased optional products designed to address the new regulations, and served as a source of information on the new legislation's effect on homeowners across the United States.

The format turned out to be so successful that the company has started to embed it throughout the organization as a core vehicle for communicating to and educating employees about multiple new initiatives.

The proportion of technology-based learning in BEST organizations was 36 percent in 2006. Self-paced learning continues to be the most popular type of technology-based delivery.

ANEL CORPORATION

The custom metal fabrication supplier could not keep up with customer demand and feared for the safety of its employees because they were working extra hours. To address the product quality and employee safety issues, Anel hired a training coordinator and a welding instructor.

With its focus on hiring employees who may lack the needed technical skills but were local and possessed good character, Anel found a strong pool of potential job candidates.

With assistance from Holmes Community College, the company established an eight-week pre-welding course and a 30-day post-welding course. The learning initiative consisted of two weeks in the classroom discussing welding concepts and six weeks of hands-on training. All hired workers were required to achieve a ninth-grade math proficiency and full production level within 90 days of employment.

Every candidate did not become a welder. Some were hired as machinists or quality inspectors. More than

The average number of hours of learning per employee for BEST winners was 44 in 2006.

93 percent of the employees who were hired from the welding program are still employed with the company while the retention rate among employees hired outside the learning initiative is only 43 percent.

Sales have grown by 300 percent over the last three years. During that same period, absenteeism decreased by 50 percent and direct labor costs fell by 14 percent.

BAPTIST HEALTH CARE

One of the not-for-profit healthcare organization's corporate strategies in the past year was to achieve best-in-class clinical outcomes and safety performance. To improve this strategy's execution, the organization set a goal to standardize safety and emergency response codes. The corporate university team, as engaged by the vice president of quality and patient safety, created a work statement to begin completing this goal.

The statement included advertising through a company newsletter and rolling out new codes and processes five to six months before the implementation date. Another tool was using the existing cascade learning process, taught by all leaders, to educate staff on the new codes and how to use them. Color-coded badge hangers, table tents, and phone stickers also were created and distributed to all employees to help them memorize the new codes. A month prior to

implementation, the old and new codes were called at the same time to familiarize staff with the new codes.

Most notably, the team widened the scope of the project by soliciting support from two local competitors to help adopt the new codes. The team facilitated this effort by providing all plans and materials to its competitors to use as needed. The two competitors also implemented the codes to ensure a uniform system across the community.

Another important success at this organization was the creation of an employee attitude survey database by the corporate university. The user-friendly database allows employees to simultaneously view one screen, which focuses on an overview of the specific action plan, alongside another screen, which provides details such as action steps, project status, and key milestones.

BB&T

All bank employees have a personal development plan that outlines annual objectives, strengths, and opportunities for growth. Each staff member is evaluated every six months, and managers are required to discuss training completed by the employee as well as identify potential training courses for development.

To renew its commitment to customer service, the bank launched its "perfect client experience" initiative to its employees. The initiative emphasizes reliable, responsive, empathic, and competent customer service. Materials, including videotapes and a leader guide, were sent to all managers to conduct the training.

Another component of the initiative was just-in-time training for 1,400 employees on a new problem resolution process. Clients with more complicated problems receive a written commitment from customer service regarding

completion time and expectations. After this new process, customer surveys revealed that BB&T recorded fewer problems than its large in-market competitors.

The bank continues to expand its outreach programs to the Spanish-speaking community. Employees who interact with Spanish-speaking clients receive a kit that includes a reference guide, a DVD that contains scenes depicting common banking transactions, a CD soundtrack, and a participant workbook. Upon completion of the self-study guide, employees call into a telephone testing service to gauge proficiency.

Audio tapes on basic banking scenarios were produced for Spanish-speaking clients to make them feel comfortable with various banking transactions. Another recently completed program is a CD series that simulates a radio talk show. Each episode focuses on a different topic such as income taxes and informed credit decisions.

During 2006, the percentage of employees who completed the corporate university's certification program, which measures learning of essential job tasks, rose 36 percent.

BJC HEALTHCARE

To address the looming shortage of healthcare workers in the United States, BJC HealthCare launched a career development program for entry-level healthcare workers in 2004. Building on the success of that initiative, the not-for-profit organization developed another program, Expanding Your Career and Healthcare Opportunities, to address the needs of employees who seek to advance in non-clinical positions. The ECHO initiative was launched in 2006.

Through learning, coaching, and networking, participants refresh their study skills to prepare for college, and

CATERPILLAR

study medical terminology, anatomy, and physiology to improve their current skills. They take part in classroom and online studies to identify different learning styles, develop career and learning plans, create a time management calendar, and examine strategies for moving up the career ladder.

The program has given many participants the confidence to continue their education. Out of the first 22 ECHO graduates, five have enrolled in higher education and 12 have made plans to do so. Four participants have received a promotion, and two have interviewed for higher paying positions.

The organization's learning opportunities also include an on-site MBA program, partnerships with local community colleges and universities, software skills classes, leadership development, and adult basic education courses. Employees can choose from a number of learning methods ranging from traditional instructor-led classes to self-study and online learning. In 2006, 84 percent of employees enrolled in at least one learning program. The employee retention rate among those who completed the courses was 91 percent.

BWXT PANTEX

Mistakes are costly for any organization. But at BWXT Pantex, they can be downright fatal. That's because the company manages and operates a government-owned nuclear plant northeast of Amarillo, Texas.

In addition to engineering, administration, and management duties, the company's 3,400 employees are responsible for the plant's nuclear weapons and high explosives operations, plutonium pit storage, safety, and security. Consequently, the company places the utmost importance on accident prevention and awareness. BWXT Pantex's approach has been to

The success of Caterpillar hinges on the success of its more than 100 dealers, who must understand the company's products thoroughly before they can sell them. "We consider dealers to be a critical extension of our enterprise," says Frederick A. Goh, manager of strategic learning for Caterpillar University.

It's one thing to use a distribution channel to sell power equipment. It's more challenging to equip that channel with knowledge, especially when offering a wide range of product lines. "Our dealers have to know the why, not just the what," Goh says. "They need details about the true value of our products, not just specifications and model numbers."

Caterpillar University's College of Marketing and Distribution launched a project three years ago to enhance dealer sales effectiveness. Its aim was to create a process that tied learning solutions to dealers' business goals. The program comprised several elements, including a three-level sales certification process, shared best practices worldwide, an online assessment for salespersons, and a template for development of individual learning plans based on the assessment results.

Caterpillar University now delivers competency courses to dealers via e-learning in eight different languages, as well as more targeted offerings in 21 languages that address specific needs that arise in the assessments. Nearly 4,500 dealer sales professionals are engaged, and early performance metrics indicate "considerable success," Goh says. Previous marketing programs from Caterpillar University generated return-on-investment of more than 40 percent for Caterpillar and nearly 400 percent for dealers.

Caterpillar's companywide training mission is ambitious: to be the best continual learning organization in the world. Each of the firm's more than 95,000 employees receive "four buckets" of instruction, Goh says, including required annual e-learning modules, training specific to the employees' business units, education central to their job roles, and discretionary guidance relative to their career paths. Most training is delivered directly to employees using the firm's learning management system. In 2006, employees participated in more than 562,000 e-learning sessions, an 86 percent increase from the previous year.

Caterpillar's knowledge management system provides more than just a global repository. It also serves as a social-networking platform, tying communities and disciplines together across the value chain. The system has grown from fewer than 500 communities of practice in 2001 to more than 4,500 today. "We see a key difference between learning to know more, and learning to apply and share that knowledge. The latter is much more relevant," Goh says.

So is measuring the impact of education initiatives. Each major program at Caterpillar is graded by a performance scorecard and a reporting process that examines business impact. Reaction, application, and ROI data are reviewed monthly and reported to the board of governors quarterly. Over the past six years, the company completed 11 studies to demonstrate how its corporate university program improves business performance. A study of a new first-line supervisor course delivered an ROI of more than 240 percent through improved productivity and team effectiveness.

"Keeping in mind that we're a manufacturing firm, reducing employee injuries and improving safety performance continue to be the top priorities at all facilities," Goh says. Analysis of employee injury data revealed that hand and finger injuries were far more frequent than any other type, so Caterpillar University developed and deployed a hand-safety curriculum of more than 300 sessions. The key result: a 24 percent reduction in recorded hand injuries.

implement a culture of high reliability that emphasizes constant awareness of high-consequence operations, organizational weaknesses, accident and injury precursors, and experience-based learning.

This cultural change is achieved by a variety of programs, one of which is the teaming of technical training and line management through the company's Line Manager Training Observation Program. Most accidents occur at floor level where humans interface with the system. The LMTOP provides direct evaluation of training evolutions by field managers who are most familiar with the operations.

The program also provides rapid feedback to the technical training organization, which can then quickly implement corrective actions, including training content modifications that are disseminated to the field through mini-training events. Because the observation program is performed by operations managers, the results are more focused and enhance training effectiveness as well as the quality and safety performance of the workforce.

This program and other training initiatives such as human performance improvement, conservative decision making, and causal analysis are working together to heighten the safety awareness and high reliability culture of the company's workforce.

CLARKSTON CONSULTING

Among leaders and managers in this management and technology consulting firm, the win-win-win philosophy—"win for clients, win for the firm, win for the employees"—was one of the key initiatives implemented in 2006. This motto encourages managers to consider how to benefit clients, shareholders, and employees when making business decisions and managing projects.

To support this plan, the training and professional development team conducted a series of training sessions that gave leaders the opportunity to learn the philosophy as well as learn and discuss best practices for its integration. After the sessions, the team, with the support of company executives, worked to ensure constant communication about the win-win-win philosophy and its incorporation into employee performance standards.

Another firm initiative developed in the last year is an improved knowledge management program. This program includes a new knowledge management framework to support business objectives and communities of practice such as centers of excellence and specific departments. The framework includes new processes geared toward sharing information centrally and integrating it with classroom training to facilitate organizational learning. A new portal also was launched that allows employees easy access to content such as repurposed training materials. One of the site features is an embedded search function across corporate knowledge resources.

The firm also began using wikis and blogs among various communities of practice to encourage collaboration and information sharing and to further facilitate a blended learning environment.

EMC CORPORATION

When the organization's highly skilled information technology staff members were required to devote a substantial portion of their time to completing routine tasks, management decided to alter the hiring and training process. In 2005 company leaders launched the Technology Solutions Associate Program. Rather than hire new employees and put them through six months of training, the organization decided to hire recent college graduates who could be prepared in 90 days to handle

less complex tasks. The initiative saved an estimated \$5 million.

In the coming years the demand for IT professionals who are qualified to work in data storage will rise exponentially. Yet managers report that only 33 percent of their employees are prepared to handle the explosion of data.

EMC Corporation offers an Academic Alliance program designed to introduce students to the field of data storage. Universities worldwide are participating in the open curriculum called Storage Technology Foundations, which is the first storage education and certification program of its kind.

More than 100 colleges offer the course, and 1,500 students are enrolled. There are three levels of storage technology expertise and certifications that can be acquired. The courses are focused on storage concepts and principles rather than specific products.

ETS

ETS created an action learning leadership development program—Learning for Business Results—to enhance decision making and collaboration skills while generating solutions to challenging business problems.

Officers select between six and eight candidates at both the director and executive director levels to participate in the annual groups. Over a six-month period, program attendees collaborate with one another to solve a complex business issue that the CEO assigns to them, such as determining the feasibility for entry into a new business arena.

Along with their day jobs, participants invest a significant amount of time, effort, and energy to complete their LBR work. Sessions, led by the company's chief learning officer, offer tools and models to help the participants gain knowledge in mentoring, assessing feedback, and creating successful teams.



The program culminates in the presentation of solutions to the CEO. Past proposals have included restructuring project management, assumptions of revenue generation, environment change projections, product conceptualization, and launch strategies.

One significant business outcome of the LBR program last year was the conceptualization, research, and design of a completely new business line. Implementation of this recommendation resulted in business opportunities in the consumer market and new partnerships with Microsoft, AOL, and Discovery Channel that has netted projected income of \$200 million within five years.

GABLES RESIDENTIAL

As a way to help sales staff stay competitive, the company contracts with an external company to videotape sales representatives incognito. Sales associates are taped at random as the external company visits each location twice a year. Called the mystery shopping program, the initiative was expanded to include trained evaluators who pose as buyers, evaluate the sales representative, and write a full report.

The video is one of the company's most effective training tools. Each member of the sales team is required to review his own tape and write a report as they watch the video. All sales associates review the video and the report with a learning and development professional. Sales associates demand a lot of themselves, so the process is intended to provide encouraging feedback exclusively. The sales associates' monthly bonuses are tied to their performance on the other segments of the mystery shopping program which include a telephone shop, on-site shop, and an internet shop. Video shops are used for coaching and development only.

With more customers conducting housing searches online, the company

had to bolster both the timing and quality of its responses to inquiries. A customized online course and a regimen of mystery shoppers enabled the company to improve its response time by 200 percent in a matter of months.

While a number of online and classroom courses are required for employees, college credits are available for individuals who choose to participate in the program. All courses offered by the company are approved college curriculum, and credits are granted at each certification achievement level. At the end of the year, the learning and development department presents a strategic review that summarizes the year's activities. All accomplishments are matched against goals that were established before the year began.

HIGHMARK

Learning and organizational performance go hand in hand at Highmark, an independent licensee of the Blue Cross Blue Shield Association. The Pittsburgh-based health insurance provider recently activated a performance management system that requires all employees to have a developmental goal. Development goals are linked to both individual performance goals and business objectives.

All 11,000 Highmark employees can take advantage of a variety of learning opportunities, such as searchable reference materials, job aids, and on-the-job learning sessions. Seventy-four percent also participate in formal workshops and online courses, and all workers have access to electronic performance support, mentors, and the company's tuition reimbursement program.

Before any specialized training request is implemented, however, performance consultants work with their client areas to develop a service agreement. The agreement outlines the

**BEST
organizations
continue to
allocate more of
their spending to
internal services,
reaching 68
percent in 2006.**

scope of the project and its learning and business objectives. This ensures that the training can be directly tied to business goals. The proposed learning solution can be connected to specific corporate goals or business drivers, such as increased revenue, cost avoidance, or improved service.

In addition, each agreement categorizes the results produced from the learning solution as either "hard," such as fewer product defects, reduced delivery time, increased revenue, or reduced costs, or "soft," such as improved behavior, work practices, and culture. Officials say the tool has been well received by the company's workers and has helped quell misunderstandings regarding expected outcomes and accountability.

HOWREY LLP

In 2006, this global law firm introduced its first Leadership Academy. Focused on fourth-year associates, the academy introduced new concepts and activities atypical to law firms. One of these features was an upward feedback tool that helped associates to compare their own understanding of their leadership styles with the perceptions of their employees.

INFOSYS TECHNOLOGIES LIMITED

Some organizations analyze and adopt new information technology systems at a breakneck pace while others implement changes gradually. That presents a significant training and development opportunity for Infosys, a global IT and consulting services provider that must absorb up-and-coming technologies while simultaneously partnering with its clients.

"We need to be in a constant state of readiness," says V.P. Kochikar, associate vice president of education and research at Infosys. "The range of technologies organizations use is growing, and industry changes occur very rapidly. We have to move extremely fast." Proof is in the sheer number of learning courses Infosys provides—more than 1,000. IT systems account for 53 percent of training content.

Internal training for Infosys's more than 59,000 employees occurs at two levels: a 14-week foundation program that imparts basic competencies for new software engineers, and continued training for experienced staff that builds depth in technology, process, and domain skills.

The firm's learning mission extends beyond staff. Infosys recently realized that the revenue from a couple of its largest accounts wasn't growing in proportion to their potential. "To break this pattern, it was imperative to build trusted advisor relationships with senior management," Kochikar says. "We needed to deliver a broad and deep portfolio of knowledge and create sustained behavioral change."

Infosys conducted 360-degree assessments to identify key clients' developmental needs and conducted workshops to help managers articulate the business value of Infosys solutions. The company also provided employees with personalized coaching and mentoring. Infosys projected the initiative would generate high-value deals worth \$27 million; the program generated \$82 million.

"The driver that's helping us upgrade skills and give people fresh knowledge is our ambition to move up the value chain—to become partners with our customers and serve as an extension of their businesses," says Girish G. Vaidya, senior vice president of the Infosys Leadership Institute.

A large United States financial services provider recently turned to Infosys to improve its knowledge about cultural diversity. The client had grown largely through mergers and acquisitions, and was facing adverse media coverage and an internal backlash against outsourcing. "The previous diversity initiative classified people into two categories: dominant and subordinate. Its idea was to help those identified as subordinate, but the method was too divisive," says Aruna C. Newton, a principal consultant at the Leadership Institute. "This was as an opportunity to build a strategic partnership that was about changing the cultural fabric of an organization."

Infosys built a needs analysis using appreciative inquiry, then provided workshops that improved the client's cultural dialogue and its understanding of the reasons behind individual preferences. Today, the financial services firm has 60 culture-change experts.

To ensure that Infosys's learning-strategy investments yield results, the company's leaders and governing learning council review the firm's action plan and training performance every six months. Also, an internal employee certification program is integrated within the firm's performance management system, and promotions and benefits are tied to "a full dimension of competencies," says M.P. Ravindra, senior vice president and head of education and research. Two such skills are strategic vision and the ability to manage change.

Through an initiative called Campus Connect, the company helps to enhance the skills of engineers and recent graduates. More than 16,000 students from 342 colleges participate, and Infosys has hired more than 1,700 graduates of the program.

Leadership styles included behaviors such as listening, setting goals, developing action plans, directing others, giving feedback, setting rewards and punishments, and developing rapport with employees. Having leaders understand their own styles from the point of view of their staff was a unique and successful method of helping team performance and productivity.

A series of interactive theater demonstrations with professional actors simulating realistic leadership situations also was part of the academy. The associates watched the piece, analyzed the behavior of the actors, and posed questions to understand the motives of the characters. They also offered insights on how to "redo" the scene to provide a better outcome.

Another teamwork and leadership activity simulated an *Iron Chef* competition. After learning about leadership styles and teamwork behavior, participants were tested in a live timed cooking competition. Part of the competition included switching the chefs from one team to the other to challenge each team to integrate new members under high-pressure circumstances. Judges evaluated the meal results, the oral presentation of the menu, and the teamwork skills of each team. Associates rated these creative programs 4.9 on a 5.0 scale.

ICICI BANK LIMITED

When India's second largest bank needed to boost the skills of its employees, its learning and development team borrowed a technique from American football.

While in the office, ICICI employees have access to I-Quest, an online repository of all company processes, policies, and precedents. Employees simply query the system and are able to locate the needed information as they interact with customers.

The problem with the system, however, is that it is not accessible to the



bank's traveling salespeople, who comprise half of its workforce. What's more is that without deep understanding of the bank's products and services, such workers risk losing customers' trust—the foundation of the banking relationship—when they are unable to immediately respond to questions.

Instead of hiring more managers or conducting traditional training classes, the bank chose to deliver the learning via mobile phones. This on-demand approach would ensure that employees obtained the information when they needed it most.

The learning team envisioned the support to be similar to the instructions relayed to a quarterback from his coach. They carefully designed scenario-based audio learning modules, which focused on knowledge and comprehension. The content was purposely presented in chunks to avoid memory overload and stimulate recall of prior knowledge.

After a pilot promotion and some tweaking, the service was launched in the vehicle loan and credit card departments. During the first week, approximately 1,500 employees accessed the platform more than 74,000 times. Now, it is regularly used by 8,000 salespeople.

IQOR, INC.

The learning department at this collection agency has built a workplace culture that is dedicated to teaching all elements necessary to produce exemplary results for employees at all levels. But the learning, according to the company's workplace learning and performance professionals, doesn't have to be stale and boring.

To teach complex federal laws and ensure that all employees will pass a test with 100 percent efficiency, the training department created a movie on the specifics of a federal law. The script, production, direction, and acting were all done by company employ-

ees using rented equipment. The cost of the production was \$4,000.

Employees enjoyed the film, and many asked to view it a second time. The amount of retests dropped 62 percent.

Company trainers also searched for innovative ways to motivate company employees. Each week, one day is designated with a theme. Each department holds a competition around that theme and votes to determine the winner. Photographs are taken and added to the weekly newsletter. Best practices are shared in the form of games, such as hangman, word searches, and crossword puzzles. Employees also are encouraged to submit "Ask the VP" questions, and those questions and answers are published in the newsletter.

More than 80 percent of employees gave a satisfaction rating of four or five on a scale of five.

LAWRENCE LIVERMORE NATIONAL LABORATORY

After 54 years of operation in the public sector, this scientific research and development organization changed course to become a limited liability corporation. The change represents a significant cultural shift that affects all levels of the company. To prepare for the adjustment, the human resources development team put together an organization-wide change-management plan that was soon adopted by senior leadership.

The plan included briefings given to top management, then to groups of interested employees, and finally to teams across 12 directorates. An external consultant with extensive experience in mergers, acquisitions, and change management was hired as a strategist for top management.

Development programs were refocused to reflect the company's evolution. A leadership lecture series, onsite training and development courses, and e-learning tools were

Since 2003, more than 88 percent of vice presidents and C-level executives in BEST organizations have made public statements that support learning and included learning objectives as part of their performance goals.

consolidated into an online knowledge center on change management. The site featured streaming video of the speakers, briefings, and online courses. Indicating its usefulness and value, the site receives thousands of visits each month.

Another recent initiative was the realignment of the succession pool development program. A greater emphasis was placed on coaching, challenging assignments, and learning options at every level to help develop emerging and existing supervisors and managers for current and future leadership roles. The program's structure is now working more directly with organizational development consultants to provide coaching and consulting support.

Program results show that realignment has been a successful venture. Forty-two percent of succession-development graduates received promotions this year as compared with 29 percent last year.

LEXISNEXIS

LexisNexis, which provides information and business solutions to various professional markets, set out to train its customers to reap the full benefits of the company's products and services. Last year the company's customer support team responded to more than 1 million customer calls, 36 percent of which were about research and provided unique training moments for customers. In 2006, customer support delivered more than 60,000 hours of customer training.

In addition to selling products and services, company sales representatives trained customers on how to use them. In one sales division, 260 sales representatives provided 180,000 hours of training to more than 4,000 customers.

The company implemented a strategy to help its sales staff provide solutions to customer needs. The initiative includes online manager toolkits that contain talking points, meeting presentations, and videos; face-to-face functional learning session materials; and communication tools such as intranet articles and websites.

The communication and learning tools were designed to empower LexisNexis employees to deliver the company strategy and transform the organization from one that sells products to one that sells solutions. All company employees were mandated to attend an experiential workshop that explored the past, present, and future of the company. At the end of the sessions, employees created personal action plans that contributed to the company's transformation.

NEMOURS

The Nemours children's healthcare system, which annually treats 238,000 children in five states, developed a program, Catch Me Before I Fall, to

prevent patients falls and enhance hospital safety at its Alfred I. DuPont hospital campus. Research conducted in 2005 showed that while the incidence of pediatric patient fall rates were low, the potential for serious injury when a fall did occur was high. Several performance and learning strategies were created that decreased the number of pediatric patient falls in 2006.

The learning function supported this program by working with staff in two inpatient pilot units, hematology and oncology. First, hospital staff were educated to increase awareness of falls. These sessions were followed by an examination of risk factors related to falls. The learning department produced job aids for nurses to assist them in creating patient care plans as well as educating families on fall prevention. The effectiveness of this approach was assessed through performance feedback and patient fall data. The fall prevention program continues to deliver improved levels of care for children and their families.

In another recent initiative, the learning function helped to establish a comprehensive project-management infrastructure. Intended to create a unified organizational approach to project management, the approach includes a self-paced online course, instructor-led courses, a certification track, and a central web resource that provides templates and access to mentors.

The project-management program has been incorporated into the operating protocol of the organization. With the infrastructure in place, the program is now moving into its next phase as learners achieve certification, project sponsors seek specialized education, and project-management "guilds" begin to form across the organization.

RUBY TUESDAY INC.

Last year the restaurant company introduced a master's program. The

certification created a new class of "masters" who can teach a particular skill to their teams. All company leaders participated in the initial training and were certified as burger masters. They then returned to their restaurants to train staff, ensuring that training was delivered on a consistent basis. The emphasis on training was rewarded by better consistency, and by customers who indicated in surveys that their intent to purchase again, along with their perception of taste and quality, improved compared with the previous year.

A district training manager program was launched last year as well. The individual ensures that training standards are consistently delivered in every restaurant throughout the organization. Each district manager assesses the training needs of managers and team members. There is one district training manager for every four to six restaurants. Individual locations were able to retain more highly trained employees, and turnover was decreased by as much as 20 percent compared with the previous year.

The company opened a new culinary arts center last year, which is dedicated to building hands-on training experience for all employees from hourly employees to senior managers. The center has a classroom, interactive stations, and all the equipment found in the restaurants. The new facility is housed within a leadership center, which offers training year around along with a lodging facility for overnight stays during sessions.

SASKATCHEWAN TELECOMMUNICATIONS

As this Canadian telecom services company strove to meet the demands of advancing Internet protocol (IP) technology, nontraditional competitors, and evolving business issues, it also uncovered a skills gap among its workers.



Specifically, learning officials discovered that the sales department was challenged to keep pace with advancing technology and customer needs. Further, past training efforts were ineffective in increasing focus on IP sales initiatives: Workers were not consistently applying the new information to their jobs, and the company was concerned with maintaining and growing market share and customer loyalty.

To combat the problem, the company's learning professionals designed an IP certification program. This blended-learning solution delivers a curriculum based on strategic IP communications, products and services, solution selling, and return on communications. Skill gaps are identified by an online assessment, and employees and their managers prescribe personalized devel-

opment plans based on the results. Participants learn through a combination of courses, mentoring relationships, and self-study resources such as white papers and technical guides. Because this is the company's first in-house certification program, a knowledge and skills library on the learning management system was created to supplement on-the-job reference resources.

Although officials are still researching the effects of the new training, data has proven that the program is succeeding. Officials say employee credibility with customers has increased. The sales force feels more confident about its knowledge of products and services, and IP sales are up by 14 percent. Certified employees—who comprise 15 percent of the sales team—now share their knowledge by

BEST award winners spent 3 percent of their payrolls on training in 2006.

mentoring noncertified personnel. The company also administers learning application surveys to participants and their managers 60 days after participants complete the program. Employees who complete the certification are recognized by senior management for their success and contributions as sales professionals.

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MICROSOFT

By the end of 2007, the number of new products Microsoft will have shipped will be greater than the number of products it has ever shipped in the past.

"That might be mind-boggling, but it's accurate," says Cedric T. Coco, the company's general manager of Engineering Excellence.

The software provider's hectic product-release schedule has bolstered its need for solid training and development. More than half of Microsoft's learning content is devoted to industry-specific learning and product knowledge.

The company's latest PC operating system, Windows Vista, showcases a unique training perk for the organization: It's able to teach what it develops internally, rather than what a third party creates. "The shorter our time from product conception to distribution to competency, the better," Coco says. "That speed is an absolute foundation of Microsoft, and it necessitates our agile learning environment."

Extended enterprise learning recently became a primary focus at Microsoft. The company designed and delivered several new initiatives this year, including formal classroom and online training programs for its marketing and sales employees, and educational programs and campaigns for partners and other vendors that sell and distribute its products. It also launched new certification programs for industry professionals who use those products.

"The releases were successful, as confirmed by feedback from customers and partners," Coco says, adding that the company's learning effort speaks directly to its overall mission of helping people and organizations realize their potential. "Focusing on the experience of users—how they leverage technology to achieve goals—is the essence of our work."

What's truly working for Microsoft is a customized approach to performance improvement. At a time when just-in-time learning is a popular goal, "we're trying to become 'just-for-me,'" says Irada Sadykhova, the director of learning strategies at Engineering Excellence. "Each employee needs resources to better comprehend a specific job, distinct tools to make it happen, and often a peer expert to help. The jobs are different, and everyone learns differently. We have to account for all of this."

Engineering at Microsoft relies on a balanced portfolio of blended learning that includes formal classroom sessions, lab workshops with mentors, brief expert- and leader-driven talks, online community discussions, think-tank sessions, networking events, and online knowledge-management databases made available on the company's intranet. Key content includes information about innovative technologies and what Microsoft calls "deep-dive" topics that emphasize the need for soft-skills development.

Rather than trying to force learning onto its more than 70,000 employees, the company focuses on removing barriers that hinder learning, providing fast access to training resources, and designing simple programs that quickly drive performance improvement. "Shaping the learning environment—not forcing employees to change, but guiding and supporting them in enhancing their competencies—is our focus," Sadykhova says.

The chief architects of the plan are members of Microsoft's executive learning council, the virtual learning governing body of the company's internal and external training programs. "Because learning here is decentralized, we need a community to align corporate strategies with our learning agenda," Coco says. "In more traditional models, the process says, 'Tell me what your challenges are. Then I'll go away, build solutions that present answers, and see if they work.'"

Because of the governance and communication of the learning council, no one is "ruling" training at Microsoft. Rather, everyone is constantly part of it.

SCOTTRADE

The retail brokerage firm's motto is "Hire for Attitude, Train for Success," and it exemplifies its commitment to training employees.

Last year the training department created a 20-week intern learning map, which is an online program that resembles a college campus. Some courses are available online while others are taught by branch managers. The map includes "buildings," which correspond to a week of learning that interns are encouraged to acquire. Each week interns learn about topics such as customer service, corporate culture, and account funding.

A total of 50 courses are required in addition to 11 optional courses. When the original intern program was launched in 1998, it did not include any formal training. Within six months of the introduction of the new program in 2006, 64 interns had been hired as associates. Being an intern offers a pathway to leadership in the company. Among the ranks of branch managers, 18 percent started as interns.

A customer service simulation training module was introduced last year. Participants were expected to use the program to enhance their customer interaction skills. A typical exchange involved communicating with a customer who held accounts with a competitor. To demonstrate learning, a contest was initiated last year whereby various departments submitted their best customer call for consideration. One winning call was selected from each branch region.

By revising training processes, the company was able to reduce the training time required for new associates from nearly six months to three months. No formal training process existed prior to 2005.

TELKOM SA LIMITED

A skills acquisition project identified a dire need for advanced networking technology skills in Africa. Telkom spent the early part of 2006 designing and implementing a management of next-generation networking (NGN) technology training program.

The training solution focused on two areas: essentials training and professional training. The goal of the essentials training was to provide participants with an understanding of the issues and factors associated with a next-generation network. The program focused on NGN principles, market drivers, regulatory framework, network migration strategies, billing in an Internet Protocol environment, management architecture, and service platforms.

At the end of the five-day program, participants were required to complete an assessment that tested their ability to apply NGN principles to a market scenario. During 2006, 310 employees completed the training. An 80-percent confidence rating was recorded after the program.

The goal of the professional training program is to develop a targeted group of specialists to address organizational challenges through appropriate technology decisions. The professional training program focuses on NGN drivers, technologies, and technology integration. Participants are required to demonstrate their ability to apply their NGN knowledge to real technological issues facing the company.

The professional program is supplemented by a global study tour, during which the participants research the implementation of next-generation networks in various countries so that they are better equipped to implement technology strategies. International visits in 2006 included trips to China, Australia, and Europe.

TELUS COMMUNICATIONS

As any practitioner would agree, selecting and designing corporate learning solutions is no easy feat. But TELUS has found a way to successfully link its organizational learning and performance plans to corporate strategy. Its trainers are focused on providing mission-critical information that closes knowledge gaps and boosts performance. In fact, the company says it does not offer training that is not directly linked to increased individual or organizational performance.

TELUS learning consultants partner with the business units to identify and execute strategic learning initiatives for its nearly 30,000 employees. This connection with the business units allows the team to be part of the strategic planning process and have a thorough understanding of how it can support them in achieving their goals. These learning consultants also play a key role in ensuring that the organization offers the most effective training possible. They conduct vital front-end analysis, which identifies the nature of performance gaps and establishes the appropriate solutions, as well as in-depth investigations to better understand the audience and its learning styles and preferences.

When training isn't the answer, these consultants suggest other more appropriate resolutions. They also work in a decentralized training model, in which some business units have small teams of learning specialists while others rely on vendor resources and outsourcing solutions.

All training programs are measured for success using Kirkpatrick's methodology. The learning team links Level 3 results to the HR performance scorecard, which directly affects the salaries of both departments. Officials say that visibility ensures that the learning creates positive behavioral change among workers throughout the company.

In BEST organizations, 66 percent of learning was instructor led and the majority of that training was still classroom based.

THE SCHWAN FOOD COMPANY

In the past year, the global food company has worked to develop and expand the educational opportunities it offers to its employees. An accelerated degree program was launched with customized features. The program, which contracts with three accredited institutions, consists of seven-week online modules that help students earn bachelor's degrees in three years or less. Other degrees offered include an associate's degree as well as an MBA.

Many of the materials in the program have a dual learning effect in that they are specific to the company's needs and relevant to the subject matter at hand. The company's corporate university also has specific courses that are applicable for up to six credits toward an employee's degree. Through development of this program, employees can seek higher degrees more efficiently than through traditional degree programs.

Another venture this year was the expansion of the talent-management program. While this program originally started out as a senior executive development program, last year, the model was expanded to encompass all business units and key business managers.

The central focus of the talent-management program is the nine-box talent matrix. This tool allows the company

AMERICAN EXPRESS COMPANY

The American Express Learning Network, a team of learning and development professionals, recently launched a number of initiatives to address the attrition and increase employee engagement at the company's customer service centers.

First, the learning network launched Connections, a program that educates new employees about the firm's values, vision, and customers. The training team partnered with human resources and call center professionals to conduct a root-cause analysis of employee attrition. They determined customer service agents needed to feel more empowered to be the "voice of the customer," a critical link that helps American Express achieve its main objective of becoming "the world's most respected service brand."

The team included the Connections initiative in the company's orientation program. A specially trained facilitator developed a customized curriculum for each group of new employees, based on their pre-hire screening assessments.

Today, groups that participated in the program reported that attrition rates were 34 percent lower than groups that didn't participate. Also, call center employees' reaction scores have increased by 5 percent, as more of them believe training has a positive influence on their job roles and performances. In all, more than 340 classroom sessions were conducted in 2006.

"The program helps increase our customer care professionals' emotional commitment to the company, so they have a stronger desire to stay and grow with American Express," says Kim Stewart, director of the American Express Learning Network. "That is demonstrated when they interact with customers. Now when customers call, they feel more connected with our company, and that leads to improved loyalty and satisfaction." The company's long-term goal for Connections is to ignite the same enthusiasm at all levels of the organization, not just among new hires.

Another recent initiative, Coaching to Extraordinary Customer Care, focused on developing the coaching skills of frontline supervisors to help them offer better instruction to employees and thereby improve customer satisfaction. The company's learning team conducted train-the-trainer sessions with senior leaders, who also participated in role-playing exercises with a talent management coach to tutor lower-level leaders on how to recognize and develop employee skills. These sessions included tips on how to effectively prepare for an optimal coaching session, how to give and receive feedback, and how to create a solid learning plan supported by the leader and employee.

Those leaders are now better equipped to review employees' performances, talk about their aspirations, and coach them to excel, Stewart says. Since beginning the program, American Express has achieved a 7 percent increase in customer satisfaction scores.

This fall the company's executive team will begin annual discussions with its business owners about strategic objectives for 2008. The firm's training personnel will then align resources with those owners to develop new training initiatives. "Increased exemplary service is the metric that drives everything we do," Stewart adds. "All positions within our learning function are held accountable for that achievement, and our dedication to the goal is constantly pushing us forward."

to measure and monitor employee development by taking into account individual performance and potential on a standardized model. The talent matrix helps managers compare their employees' past and current performances, and thereby determine their future potential. The model also helps determine what outside talent needs to be acquired.

UT-BATTELLE, LLC

At UT-Battelle, the not-for-profit company that manages and operates the Oak Ridge National Laboratory for the United States Department of Energy, an independent assessment of the organization's quality program identified implementation weaknesses. The analysis exposed vulnerabilities in several areas, including how quality expectations were communicated to staff, how quality assessment activities were conducted and documented, and how staff were trained to conduct assessments. Following analysis, a number of corrective actions were designed to address these issues and their causes. Three specifically had a focus on learning.

To ensure the implementation of the organization's quality standards, the existing Quality Assurance Fundamentals training program was revised. Thirty-seven program representatives and coordinators completed the three-hour course. The training was then offered to other persons responsible for implementing quality program requirements in the organization.

More than 460 managers and supervisors completed training on the organization's process for conducting management assessments. They received the training in 2006 as part of an annual Group Leader Update course designed to address current issues, initiatives, and needs for improvement.

In addition, a comprehensive course, Conducting Assessments Basics Training, was developed. The inter-

active eight-hour course included both group and individual learning activities. Before the classroom event, participants completed a brief web-based course to establish foundational knowledge of the existing assessment process.

Following completion of all corrective actions, an independent review was conducted in January 2007. The review team determined that all actions were effective, and reported that the assessment course, in particular, was well structured and well received by participants. The demand for the course from individuals outside the quality function was noted as an indication of the effectiveness of the training.

WAKEMED HEALTH & HOSPITALS

Retaining new nursing graduates presents a challenge for most healthcare systems. In the United States, the attrition rate for a new nurse during the first year of employment is between 25 and 57 percent, depending on the assignment. That's why the private, not-for-profit healthcare system based in Raleigh, North Carolina, designed a program that would not only reward and engage current nursing staff, but hire and keep new graduates for the long term.

The organization offers a one-year nurse fellowship program that combines clinical and educational activities to facilitate professional and personal growth. The program is mandatory for all newly hired nursing graduates, and it pairs newcomers with specifically trained preceptors in the organization who are compensated for their roles.

Nursing fellows attend orientations and ongoing educational programs throughout the year, including a skills development day, a three-month professional practice workshop, and a six-month transition workshop as well as continuing education programs. They also have access to a

web-based support system and can select from more than 100 clinical specialty offerings taught by hospital-based instructors.

During their first months on the job, the nurse fellows participate in didactic training and a personalized clinical orientation on their units. This thorough training and support enhances their patient-care skills and professional development. The second six months entail specific continuing education programs in addition to support sessions to maximize personal growth.

Retention data shows that of the 108 nurse fellows hired in 2005, 93 percent remained employed with the organization after their first year. The program has created an environment that promotes the organization as a preferred employer, helps meet employee needs while ensuring alignment of efforts, and contributes to ensuring consistent matching of human resources to service volume levels.

WIPRO TECHNOLOGIES

A newly hired engineer at this India-based technology company spends six months in the organization before becoming productive and billable. The new hire spends the first 10 weeks in classroom training and the remaining time studying the real project environment.

To reduce the initial training time, the company designed Magnum Opus, an innovative program to build technical capabilities among students. In the first phase of the initiative, a programming contest was conducted in 160 campuses across the country. The top 450 participants advanced to the next level, which consisted of 115 projects aimed at conceptualizing large Open Source themes.

Through a portal called Campus2-Career, the 450 students received

In 2006, BEST organizations allocated more than 40 percent of the learning function's resources to nonlearning activities.

training on Open Source standards, technology, and development methods. They were then assigned to work units from the 115 projects. The company paired them with 85 mentors in the organization to whom the students reported their progress.

This project work has not only helped the students meet mandatory requirements of compliance for their degrees but also has cut down their initial training from 10 weeks to three weeks. The initiative is expected to contribute \$2.1 million in revenue to the company's bottom line.

As a result of the program, the students have a well-defined project vision and are able to work in a collaborative environment to promote the Open Source concept. They also are able to quickly assimilate upcoming technology domains by working with senior architects and mentors in the organization. In addition, the organization has benefited by hiring better prepared recruits who have already executed projects of industry relevance.