

FOREWORD BY TONY BINGHAM



Leading the
LEARNING
FUNCTION

TOOLS AND TECHNIQUES FOR
ORGANIZATIONAL IMPACT

Edited by

MJ HALL | LALEH PATEL

More Praise for *Leading the Learning Function*

“This is a wonderful guide to the elements that make a great culture of learning. Born from a true collaboration among learning leaders—at organizations like Accenture, American Airlines, Deloitte, Grainger, IBM, and UPS to name a few—*Leading the Learning Function* shares important new perspectives and effective strategies.”

—Britt Andreatta, PhD, CEO, Britt Andreatta Training Solutions

“The ATD Forum has done a masterful job compiling best practices, innovative tools and techniques, and strategic processes from over 40 senior practitioner members. If you are looking for how-to examples to enhance performance and elevate the value and impact of your learning function, look no further than this must-have resource for all learning leaders!”

—Rita Bailey, Owner, Up To Something

“The future of work may be uncertain, but one thing is for sure—there will always be a need for continual upskilling of the workforce and talent leaders who can achieve it with a sound strategy and tried and tested tools and techniques. This book showcases innovations for today and provides fuel for tomorrow.”

—Elaine Biech, Author, *The New Business of Consulting* and *ATD's Foundations of Talent Development*

“*Leading the Learning Function* is full of real-life examples that demonstrate how to turn leadership theory into practice. You'll find tips, tools, and techniques that will help you excel at any level of leadership. Read this book and be a better learning leader!”

—Ken Blanchard, Co-Author, *The New One Minute Manager* and *Leading at a Higher Level*

“This extensive, but practical, collection of processes, practices, stories, tools, and techniques from successful practitioners in a variety of industries provides the fundamentals for enabling all learning leaders to build organizational capability that produces impactful results. *Leading the Learning Function* is the new go-to source for all talent professionals.”

—Marshall Goldsmith, *New York Times* #1 Bestselling Author, *Triggers*, *Mojo*, and *What Got You Here Won't Get You There*

“Compulsory reading for any future-focused leader wanting to put talent development at the heart of their organization's success. *Leading the Learning Function* draws into one volume the distilled wisdom of seasoned learning leaders who prove that intentional learning transforms organizations.”

—Jonathan Halls, Author, *Confessions of a Corporate Trainer*

“This book is a smorgasbord of learning and development ideas, content, and inspiration that will provide anyone leading the L&D function with targeted, focused, and actionable information to take their organization to the next level and beyond.”

—Karl M. Kapp, EdD, Professor of Instructional Design and Technology, Bloomsburg University

“Experience is the best teacher as long as we learn from it. And that's what the contributors to this book have done. Kudos to MJ Hall and Laleh Patel for bringing together a phenomenal group of on-the-ground experts who share their strategies, techniques, dashboards, examples, best practices, and lessons learned. It's a treasure trove of essentials for the 21st-century talent developer who needs relevant, experience-based, and practical information to help guide them through the challenges of preparing today's workforce. If you want to thrive in the future, prepare in the present by putting *Leading the Learning Function* to use in your organization.”

—Jim Kouzes, Co-Author, *The Leadership Challenge*, and Executive Fellow, Center for Innovation and Entrepreneurship, Leavey School of Business, Santa Clara University

“*Leading the Learning Function* offers insights into the key leverage points for impact, innovation, and engagement. It is overflowing with creative ideas and best practices from leading talent development practitioner experts who are serving on the front lines.”

—Manuel London, PhD, Dean, College of Business, State University of New York at Stony Brook

“*Leading the Learning Function* is a must-read for anyone who needs practical, step-by-step guidance for identifying, acquiring, and growing talent in any organization. Loaded with time-tested models, results-enabling questions, and easy-to-implement best practices refined from the experiences of 31 expert TD professionals, this book provides timeless resources every leader needs to maximize human potential with guided confidence and expertise. If you’re seeking a road map for achieving real, measurable, and scalable impact, this is it!”

—Sardek P. Love, CEO, Sardek Love International

“Learning can be natural, yet leading learning requires strategy, agility, readiness, divergence, collaboration, and leadership. *Leading the Learning Function* provides the tools and strategies essential for strategically driving learning in our evolving organizations.”

—Elliott Masie, Chair, The Learning CONSORTIUM @ The MASIE Center

“In *Leading the Learning Function*, you’ll get a unique look into the challenges that experienced learning leaders face as you read their reflections, practical experience, and advice. Additionally, the editors infuse a layer of value-adding insights to help you see the larger story unfolding in talent development: organizations are transforming, and learning is the dynamic that makes this transformation possible. These are creative times for the learning and development field, and the lessons in this book will catalyze you and your team!”

—Pat McLagan, Author, *Unstoppable You*

“I found *Leading the Learning Function* to be highly pragmatic in its approach and thorough in its review of the latest thinking in learning. I especially liked how it pivoted on creating programs directed at performance outcomes through a powerful combination of the use of strategy, methodology, and technology.”

—Bob Mosher, CEO and Chief Learning Evangelist, Apply Synergies: THE 5 Moments of Need Company

“How do leaders add value? The Center for Leadership Studies, through the eyes of Situational Leadership®, says: Leaders accelerate the development of those around them. Hall and Patel deserve thanks for their tireless efforts in putting together a comprehensive reference that will undoubtedly help the leaders of learning functions around the world achieve this objective!”

—Sam Shriver, EdD, Executive Vice President, The Center for Leadership Studies

“Congratulations to the more than 50 practitioners from across a variety of industries for this huge contribution to the learning profession. *Leading the Learning Function* is full of practical tips, examples, and tools, written in a style that encourages readers to experiment and take action. It is a must have handbook for all talent professionals!”

—Brenda Sugrue, Global Chief Learning Officer, EY

“*Leading the Learning Function* is one of a kind: real learning leaders sharing their experiences and lessons learned. This is not an academic or formulaic checklist of to-dos, but rather an unplugged collection of tips and resources for you to use to excel at all phases of leadership—planning, strategy, execution, and measuring impact.”

—Megan Torrance, CEO, TorranceLearning

“What impresses me most about *Leading the Learning Function* is how it combines theory with practical application. As leaders, we’ve all read about what should work in L&D; it’s refreshing to read instead about what does work. This book taps into the expertise of industry leaders, packages that expertise into effective strategies and, most importantly, explores the why behind applying those strategies to your business. I’d recommend it for any leader in the rapidly changing world of L&D.”

—Andy Trainor, Vice President, Learning, Walmart U.S.

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Foreword

Tony Bingham

“Learning is a force multiplier,” write MJ Hall and Laleh Patel in the introduction to *Leading the Learning Function: Tools and Techniques for Organizational Impact*. It’s a compelling statement because it evokes the power of what learning can accomplish. When harnessed, focused, and intentional, learning has the power to shift behaviors, beliefs, outcomes, systems, and societies. We were already in an era of unprecedented change before the coronavirus pandemic spread across the globe. In early 2020 we were seeing significant shifts in business, in science, in creativity, in technology, and in jobs. The global shutdown that resulted from the pandemic redefined almost every facet of society and it is apparent that we stand at the edge of what could be called the Era of Mass Disruption. The work of professionals who are committed to the development of knowledge, skill, and capability in the global workforce is absolutely critical today.

Likewise, the role of leaders and the development of leadership capability is paramount if we are to truly realize the potential of what talent development efforts can accomplish in organizations around the world. Learning as a strategic function requires talent professionals to lead. Real leadership is about growing future leaders while casting a vision for what is possible and how to achieve it.

Learning empowers. Developing talent empowers. Leadership empowers.

In 1991 when the ASTD Benchmarking Forum was created, the idea was simple: Provide a private consortium in which learning leaders focused on metrics-driven scorecards and shared their data to benchmark best practices. Over the years, the focus of the group expanded and so did the qualitative and quantitative metrics and topics. Performance scorecards were incorporated into ATD’s *State of the Industry* report, and the benchmarks into the association’s BEST Awards. As the field has developed

and matured, so has the work that Forum members come together to explore. Today, the ATD Forum continues to nurture collaboration, share best practices, and solve business challenges. Members are catalyzed and inspired by one another to stretch, adapt, experiment, and make their talent development efforts future-ready.

Over the years, we've been careful to protect the nature of what the Forum does and accomplishes. And members value the confidential environment in which they collaborate. Now, they are ready to share some of the insights, techniques, tools, and best practices they've built as a multiplier of their own. When we know better, we do better. The Forum members are sharing what they know in an effort to help other learning leaders know and do even better work.

When you travel by plane, you know the view from 37,000 feet is different than it is at 200 feet. If your trip is of any distance, it's likely you'll see changes in terrain and topography. You see landscapes and the components of them. But pilots see things with a completely different perspective, because their focus is on harnessing the technology, mechanics, and power of the plane to keep it on course, arriving safely at the destination. I think this can be a powerful analogy for those in the talent development field.

Every TD practitioner needs to understand the pivotal time in history in which they are working. In January 2020 at Davos, the World Economic Forum announced that within just 10 years, 30 billion people would need to be reskilled. They coined the term "Reskilling Revolution." That's the 37,000-foot view. The horizon is vast and complex, and the potential for our field to soar is remarkable.

Descend from that altitude though and you see the practical and nuanced work that must be done in organizations, departments, and individual roles and responsibilities. It is here that talent development professionals strategize, plan, and do the work of helping others grow knowledge, skills, and capabilities. There are countless inputs, levers, and gauges to consider. There are plans and objectives to achieve. And there is the execution that ties it all together, resulting in a learner going from point A to point B in their development journey, improving their ability to perform more complex work in an environment of constant change and disruption, and adding value to their organization.

Consider this book an instrument guide of sorts.

In here you will find stories and insights from your colleagues in a variety of industries who are sharing actual examples of work they did, the results they achieved, the lessons they learned, and the tools and techniques they used to drive results and impact their organizations. The power of the book isn't found in one particular example, rather it's the collective wisdom of successful practitioners that you will benefit from. More than 50 members of the Forum contributed to this effort.

I owe a debt of gratitude to the contributors, interviewees, and reviewers who collaborated to make this book a reality. The writing of the book exemplifies the ATD Forum community and its focus on connecting, collaborating, and learning from one another. Like in any Forum gathering, the goal of the book is to leverage practices that help you address business challenges in a way that enables performance and continually builds capability at the individual, team, group, and organizational levels.

World-renowned leadership expert John C. Maxwell states, “Anyone can steer the ship, but it takes a leader to chart the course. Leaders who are good navigators are capable of taking their people just about anywhere.”

The right skilling of the workforce to meet the demands of the future is a significant task—and our profession has the responsibility to chart the course and help make it happen. I’m grateful for the work that leaders in ATD Forum organizations are doing and their willingness to share that work because it helps us navigate a path forward in developing our own efforts and the impact they can achieve for the people and organizations we serve. As we emerge from this current disruption and construct the “next normal,” I encourage you to put what you learn here into action.

Together, we are creating a world that works better.

—Tony Bingham

President and CEO, Association for Talent Development

June 2020

Alexandria, Virginia

Introduction

Many say the definition of a leader is someone who can take others to a place they would not go by themselves. If this is true—as we believe it is—today’s frequently changing and complex workplace provides a unique opportunity for leaders to excel. And to excel as leaders, what must they be able to know, do, and communicate? Moreover, what changing technical areas must these leaders be experts in to build and influence the individual, team, and organizational performance capabilities of the entire enterprise? These are the challenges talent development professionals face and the questions we ask at the ATD Forum; they are also the driving force of this book.

For more than nine years, the two of us have been the hub of the ATD Forum, a vibrant consortium for connecting, collaborating, and sharing knowledge about anything related to talent development. The goal of this peer-led group is to leverage lessons learned from future-ready practices others within the community are using. This helps members stay ahead of the challenge curve to support competitive advantage and build capabilities within their respective organizations.

There are several venues for sharing practices within the consortium: semiannual community events, which are two-and-a-half day experiential labs on a topic selected by the host member; virtual web sessions called ConnectSparks, which are one-hour discussions with subject matter experts; ATD-sponsored, in-depth reports; benchmarking through short surveys; and informal conversations.

We are constantly amazed at the excellent practices these members demonstrate as they lead their respective teams. But the most interesting part is seeing these practices expand in real time: One member would share, another would ask probing questions, still another would make suggestions, and then months later, in discussions, we would hear how the initial practice had served as a trigger and was showing up in a slightly different form in another organization. Or, a team from a member

company had gone to another member's company to benchmark, and from that perspective had discovered other areas of shared interest, and they were now collaborating on another project.

This force multiplier effect of sharing learning reminds us of a quote from Seth Godin (2019):

Learning . . . is self-directed. Learning isn't about changing our grade, it's about changing the way we see the world. Learning is voluntary. Learning is always available, and it compounds, because once we've acquired it, we can use it again and again.

Our profession, like the workplaces we support, lives in a world the Center for Creative Leadership recently labeled *RUPT*—rapid, unpredictable, paradoxical, and tangled. Some of the transformations in the learning world are multifaceted and others are just new ways of operating, such as automating a system. But change, either massive or small, is always difficult. Whether the change is implementing a modern leadership process, scaling curriculum globally to accommodate new employees, upskilling employees because of new products and services, or integrating emerging technologies for more personalization of and access to learning resources, others may have gone through something similar. When facing a challenge, having examples from others and learning from their experiences provide ideas, insights, and motivation. No one is alone. When leaders engage with one another, especially those from different industries with similar challenges, the possibilities are endless.

About This Book

While sharing learning practices, exchanging case studies, and swapping resources are the hallmarks of the ATD Forum, we have found that these benefits are manifold—and we're thrilled to extend our learning reach in this book, *Leading the Learning Function: Tools and Techniques for Organizational Impact*.

The Forum relies on volunteer members, and that is how this book was accomplished. After several iterations to determine the outline of topics to cover, which included a survey to our 60-plus members, we ended up with eight major areas, each including a variety of subareas. We then hosted a web session to formally introduce the project, and followed that with an outline for those interested to sign up by topic. The result was 44 expert content contributors presenting their best practices, innovative tools and techniques, and general problem-solving methods for facing today's business challenges for learning, either as authors or interviewees.

These contributors focused on practices that are essential to developing performance behaviors to achieve desired business results—but there are no magic formulas. Like their practices, their stories are also different. Some are straightforward case studies with lessons learned. Others look a bit different than what's typically found in a business book. Instead of the usual expert-talking-to-novice approach, some chapters read more like a novel; several even include self-talk about an experience. This mucking around with ideas and questions is similar to how we acquire knowledge and skill in our daily lives: we struggle, we talk with others, we search, we solve problems, we iterate, we see associations, we learn, and we do.

As editors, we are excited to share this body of knowledge and expertise with all talent professionals, especially those leading the learning profession. This book was made possible by the collective contributions of more than 50 individuals representing more than 50 percent of ATD Forum member companies:

- 31 people contributed content as an author or co-author of a chapter
- 11 were interviewed about their thoughts on leadership
- 4 contributed interviews and case studies on tools
- 12 acted as content reviewers.

Our ultimate goal is to provide guidance on how Forum learning leaders carry out their roles to assess and build organizational performance capability that supports the business's competitive position in their respective market. The actions they take use generic leadership and management skills and address specific organizational learning pain points and challenges. The book's 26 chapters are divided into eight sections:

- Section 1, *Setting Direction*, looks at methods for proactively prioritizing and making sense of the complexity of the work. It includes aligning learning solutions with the goals and objectives of the enterprise to build capabilities. This involves a holistic view of the organization and deep understanding of what enables competitive advantage.
- Section 2, *Managing Processes and Projects*, features ideas and practices for assessing, understanding, and communicating performance needs and gaps within the organization and ways to build solutions. It zeroes in on processes and constructs unique to the learning arena.
- Section 3, *Leading and Developing People*, examines ways leaders can personally create the environments and opportunities for enabling others to excel in their roles as talent professionals. The ideas begin at hiring and onboarding and extend through continual coaching and encouraging their professional certification and credentialing. The section includes a variety of ways to set others up for performance success by serving as a spark to ignite curiosity, energy, and motivation, which can lead to new capabilities.
- Section 4, *Making an Impact*, considers how the learning profession builds capability, enabling the organization to reach its business goals. Metrics, dashboards, and evaluation processes are covered.
- Section 5, *Stakeholder Collaboration*, focuses on understanding, communicating with, and influencing those we serve in our organizations. It recognizes the value of collaborative partnerships, the ways learning can be structured to be more efficient, and the importance of a governance board.
- Section 6, *Enabling Learning Using Technology*, explores everything from the basic technologies available to track and monitor learning to emerging and disruptive technologies that are changing the way learning content is designed, developed, delivered, and consumed.

- Section 7, Innovation, recognizes how the future of work and learning is being fueled by advances in technologies and neuroscience.
- Section 8, Leader Behaviors and Practices, is jammed with moments of impact when leaders have had informal and formal opportunities to interact with and support others. These stories zero in on the many ways leaders show up, move the needle on performance, and continually reskill, upskill, and new skill themselves.

We hope this portfolio of personal stories, tools, techniques, and examples for solving business problems and challenges through capability building is both helpful in your current work and inspiring for building more powerful learning in the future.

If you take action on these ideas by experimenting with new tools and techniques and expanding your practice portfolio of resources, you and your team will be more able to address the performance challenges your organization faces. We encourage you to ask thought-provoking questions to trigger further research. But don't stop at experimenting with these concepts and building capability in your own organization. Be a leader who takes others to places they would not go by themselves—share your own challenges and successes in building performance capability in case studies and through articles, blogs, videos, and books. These actions will enable you to continuously get better at getting better with your role: coaching, guiding, and encouraging others to be open to new opportunities. Your result will be learning professionals who are masters at advising and guiding business leaders on changes that influence the future of the organization—building performance capability at all levels and in all areas!

—MJ Hall and Laleh Patel



Section 1

Setting Direction

Section 1, Setting Direction, looks at methods for proactively prioritizing and making sense of the complexity of the work for now and for the future. This involves a holistic view of the organization and a deep understanding of what performance enables competitive advantage. What does the organization want to accomplish in light of internal capability and external constraints and changes? How does the organization set priorities and communicate to all parts of the enterprise?

For the learning leader, this means being visionary at the learning level. But more important, it means being aligned and integrated with organizational goals and objectives, as well as the desired business results. This includes setting direction, deploying plans for execution, and simultaneously managing changes associated with both strategic transformations and daily transactions.

In chapter 1, Lisa Gary shares how Ingersoll Rand uses Lean and Hoshin Kanri to focus on a few vital priorities they call their North Box, and how this philosophy is replicated in every division to create alignment. This includes keeping two questions front and center in all decisions: Where will we play? and How will we win? The approach includes recognizing that while executives set direction, employees execute that direction through their respective actions and performance.

In chapter 2, we learn how a midsize bank aligns and integrates learning with the larger corporate goals and objectives using a four-step approach: know the business, build a business case, engage senior leaders, and communicate results. For each step, Sandi Maxey provides actions,

tools, and thought-provoking stop and think questions. She also suggests using the business model canvas to provide a clearer perspective for how the parts fit into an operating system.

In chapter 3, we experience a personal journey of learning being pushed into the organizational strategy. Teri Lowe uses her own conundrum as the starting point, and then uses questions, actions, reflection, and feedback to sort through the information and share her point of view of the big picture and how learning fits into the overall strategic system.

The personal journey described in chapter 4 starts with the desire to be strategic. The first lesson is that having the title does not make one strategic. However, through continuous research and lots of experiences, John Kelly recognizes that the first step is summarized by ACT: the need for access, credibility, and trust. He blends this with a framework from Peter Block and integrates project management techniques to develop his formula for being future focused.



Section 2

Managing Processes and Projects

This section is about work that is uniquely the functional domain of learning. It starts with a variety of ways to work with senior business executives to assess the capability of the organization as a system of systems. This view is much larger than learning and includes not only people capabilities but also resources, communications, and culture. It features many tools and techniques to assess the organizational needs to excel in the current market and to be competitive in the future. The ideas are based on learning research but also include techniques from other fields, such as Lean, Agile, project management, and organization development.

How do you design the work systems in your organization to ensure they are meeting current and future requirements? How do these processes enhance organizational alignment? This section demonstrates some of the many ways the learning team can make an impact on organizational goals and business results using a variety of core learning processes to build a more competent domain work system to use in service to business partners.

Chapter 5 focuses on assessing the current state and a clear understanding of a desired future state to determine performance gaps. As experts in the realm of understanding employee needs and designing learning experiences, generally learning leaders have an expansive toolkit. We can use our experience to bring context and purpose together to develop a clear and succinct point of view for when and how to use a high-impact tool or technique. But perhaps the biggest conundrum we face with the plethora of tools is how to decide how to decide? Which is the best and most effi-

cient way to close the gap? In this chapter, Chris Garton provides insights on several ways to assess needs. During the 2019 Fall Lab show-and-tell sessions, Jill Carter, Mark Lemon, Taylor Harlin, and Susana Sipes shared their written case studies and discussion presentations. Based on follow-up activities with participants and interviews with the presenters these practices and tools are included.

Once organizational needs are determined to be associated with employee capability building, learning leaders can delve deeper into the gap and work with their business partners to determine the most effective learning solutions. Chapter 6 addresses one of the most pressing issues we face—what is commonly referred to as the 1-800-TRAIN problem. The manager calls the learning department and asks for specific training without any assessment or analysis or skill in learning theory. Jerry Kaminski provides some suggestions for working with this type of request, which is usually for a triage situation. Once addressed, the experienced and skilled business learning leader can use their tools in instructional systems design to focus on the root cause of the gap.

Chapter 7 highlights the many ways neuroscience research is elevating learning practices, especially to make them stickier and more durable over the long term. In the workplace, learning is about changing performance-based behaviors as a result of new skills and knowledge. It is not so much about what we know but what we do, the actions we take. Leanne Drennan, Casey Garhart, and Joan McKarnan of IBM share research from neuroscience and then provide actions to take. One example they share is using priming questions to help connect new information with what is already known.

In chapter 8, Suzanne Frawley shares details on using a project-based approach to respond to a business partner's request. She uses the Covey adage "Start with the end in mind" by gaining clarity on the organizational need with this question: What is the business challenge your team is trying to solve? As part of the collaborative work she incorporates design thinking methods and tools to work on both a learning solution and to build the design team's problem-solving capability. The big takeaway is the value of iteration as the solution is built.

While many outside of the talent profession still think of learning as a stand-alone event divorced from work itself, learning happens in many different ways and is a continuous process or journey for most workers. There are a variety of ways learning is built into the organizational system, including formal instruction in the classroom, working with colleagues, learning from experiences, and independent learning. In chapter 9, Alan Abbott of UPS and Rachel Hutchinson of Hilti share how they use the 70-20-10 framework to build a more comprehensive learning process. The 70-20-10 framework does not eliminate formal training, and in many cases recognizes that formal training is the starting point. However, it does recognize that learning can take place in a variety of formats and locations and suggests using a variety of learning modalities—formal learning, social learning with others, and learning from a variety of experiences.



Section 3

Leading and Developing People

This section examines ways leaders can personally create the environments and opportunities for enabling others to excel in their roles as talent professionals. How do you work with others to help them build their personal capabilities and help them to convert the learning into performance actions and behaviors that affect team and organizational success through continually coaching? People development is the essence of the role for a leader and is even more critical for leaders of learning professionals. As Elaine Biech stated in *Capabilities for Talent Development*, “We need to ratchet up our role to become advisor to leaders. We need to know what their problems are and have the skills, tools, and techniques to help them solve them” (Galagan, Hirt, and Vital 2019).

This section provides ideas for making an organizational impact using a variety of ways to set the learning team up for success. Chapter 10 starts with determining how you will advertise a role when hiring. This must be intentional to ensure that your team has the collective and future-focused skills needed. Sarah Siegel and Elizabeth Huttner-Loan of IBM share their story for assessing their team needs and benchmarking other organizations to understand who they were hiring—even paying attention to the titles used and the specific requirements detailed in the job descriptions. They did not leave this to the hiring department—they did their own research. The intentionality continued as they made selections and onboarded the new team members.

Chapter 11 provides 10 unique ways to enable a team to continually learn and share with one another to leverage the collective capability. The ideas model what Lew Platt, the former CEO of HP, once said: “If only HP knew what HP knows, we would be three times more productive.” Laura Solomon and Caroline Fernandes of IBM explore opportunities available through badging, game mechanics, and content bundles and discuss sharing through watercooler sessions, learning toolkits, webinars, and coaching circles. The value is in having a variety of tools so that participants do not get bored, but also in continually adding tools that the learning team can experience first and then use with others as part of their professional practice.

While it is critical to stay current in how you practice your craft, Alissa Weiher explores several other ways talent development leaders enable themselves and others to build capabilities. First, you continue to build personal awareness of your leadership style and how you show up to others. You invest time and energy in your personal development and model self-directed learning. You serve as the guiding light for developing those on your team through coaching and creating an environment where they are encouraged to learn, take actions, and improve their performance. You demonstrate discipline and perseverance by earning credentials and advanced degrees. You engage with professional organizations to further your leadership and learning. And finally, you invest time in branding your collective department as experts in their profession, as professionals willing and able to engage at the senior levels to determine how the organization will gain or maintain competitive advantage.



Section 4

Making an Impact

This section considers how the learning profession demonstrates organizational value in reaching goals, objectives, and business results. Data, analytics, metrics, and evaluation processes often arise as sore points for learning leaders. While their goal is designing, developing, and delivering learning content, leaders are under constant pressure to prove that every penny invested produces the desired results.

There are many things to consider when addressing impact. What is the focus—learning or performance, or equal shares of both? What tools do you use? How do you design the measurement and when? How do you make decisions about metrics that are as diverse as qualitative feedback, Kirkpatrick’s Four Levels of Evaluation, the Phillips ROI Methodology, and Brinkerhoff’s Success Case method? Do you focus on outcomes or outputs?

Once you have the data, how do you make sense of it? How do you share it with stakeholders who come from different perspectives—and especially those who do not understand the language used in our functional domain? How do you display the data? How do you turn numbers into a compelling story? How do you make data dance? The chapters in this section will give you many ideas.

In chapter 13, Rachel Hutchinson of Hilti provides an overview of measures that meet the needs of the participants, evaluate the effectiveness of programs, and clearly communicate markers of achieved success to stakeholders. Using a learner-centric approach, the team at Hilti

uses data to inform the original design of the learning solution as well as make updates and changes. In addition to looking inward, they also benchmark metrics from other companies and use stories and visuals to show impact.

In chapter 14, Ron Dickson uses the story of a fictionalized learning professional's journey from irrelevant measures to mission-critical dashboards to demonstrate how to move from important training department data to data that is valuable to customers and stakeholders. Part of the process includes conducting analyses and interpretation to highlight meaningful trends, point out milestones or anomalies, and provide context as needed. While businesses are rarely fully "data-driven," the tools covered in this chapter can help ensure that learning-related business decisions are informed by data.

From a different perspective in chapter 15, Graham Johnston of Deloitte shares the reasoning and actions behind moving from a measurement strategy to implementing and maintaining a learning impact strategy. This is approached in two ways: the value and impact that the learning function provides to the business and the effectiveness of individual learning solutions. For both, impact is achieved by defining outcomes up front, and then using those to shape planning and design, the measurement approach, and its continuous improvement efforts.



Section 5

Stakeholder Collaboration

This section focuses on understanding, communicating with, and influencing those we serve in our organizations. While the primary focus is on stakeholders—those who hold the keys to success via knowledge, influence, or budget—it can also include customers, vendors, and business colleagues. We included a section on stakeholders because we recognize the value of collaborative partnerships and governing arrangements when it comes to our ability to build organizational capabilities. But this section also reflects on how stakeholder relationships can be dependent on the way the learning function is structured.

Marie Wehrung starts chapter 16 with a business case for the overarching purpose—for example, why stakeholders are important. She then uses her expertise in human-centered design to provide explicit details for comprehensively understanding all stakeholders using the stakeholder mapping process. This process is not just about naming stakeholders and identifying their respective roles; it includes understanding their point of view and the influence they have in corporate decision making.

One of the goals for writing this book was to provide an opportunity for Forum members to share interesting projects and practices with the external community. This section features entries from several members who volunteered to write partial chapters using stories about collaborating with and managing stakeholders. In chapter 17, four members worked with the editors to share snippets. Bryan McElroy provides a scenario reflecting what can happen when

stakeholders are not involved. Rachel Hutchinson explains how to use the power-interest matrix. Emily Isensee shares her experience using advisory groups, and David McGrath uses his sales background to explain the importance of building deeper relationships with targeted stakeholders.

In chapter 18 we look at structure and how it influences the configuration of stakeholders, especially in terms of a governance board. Learning structure generally runs from completely centralized to decentralized; the a popular hybrid, the federated model, sits in the middle. Using the ideas about structure and governance as context, Kozetta Chapman shares a scenario for learning about different structures and the importance of governance. Graham Johnston then provides lessons learned from a more established and mature model.



Section 6

Enabling Learning Using Technology

This section runs the gamut from fundamental technologies that help the learning function deliver, monitor, and track learning to emerging technologies that disrupt learning and enable personalization, learning paths, and trigger questions for reminders. While technology opens doors to making learning content more accessible, realistic, and immediate, it also represents the shiny new objects that surface almost monthly, tantalizing and frustrating learning leaders just from the sheer volume.

One theme that surfaces throughout this section is that while learning learners do not need to be technical geeks, they must be digitally literate and know how technologies are influencing the work, the workers, and the learning content. This also implies a growth mindset and a willingness to experiment.

In chapter 19, Jerry Kaminski addresses how the learning leader deals with new and emerging technologies requested from customers, and in the narrative makes a critical point: The place to start is clarity on the learning need and the best way to close identified gaps. The next step is to gain an understanding of the current capabilities of the technologies already in use. Only after these steps are completed is it advantageous to research emerging technologies and their capabilities to advance learning options and solutions.

Terry Copley uses a jungle metaphor to describe Hilti's venture into emerging technologies in chapter 20. As the organization advanced from an LMS to game mechanics, the cloud, and finally

virtual and augmented reality, the environment was scary and wrought with unexpected challenges. But there were also a few successes that encouraged further exploration and usage. Additionally, they partnered with and learned from experts who served as guides to navigate the terrain. While the technology was unfamiliar at the time, the team was on solid ground because their focus started with the learner—and the goal was how best to build learning assets for modern learning. The experience helped them realize that a different mindset is necessary to push us to get uncomfortable with the status quo and venture into a jungle.

Brandon Carson provides a big picture perspective for how work, employee demographics, and learning are changing in chapter 21. The more uncertain and complex environment means that every worker at every level has new challenges that need to be addressed. In sync with the rest of the book, he expounds on the imperative for learning leaders to focus on the performance required for business results. Within this overview he encourages them to adopt a digital frame of mind and simultaneously keep a sharp focus on the human element. Additionally, he provides a case study for going mobile.



Section 7

Innovation

This section is included in the book because of innovation's role in enabling organizations to stay competitive, but also because innovation does not happen consistently and pervasively without the leader serving as a model and catalyst. It is up to leadership to make sure innovation is part of the culture. Additionally, given L&D's role as an expert in building organizational capabilities, learning functions need to lead by example and push all leaders to think differently about the way they develop and provide products and services to their people.

But what is innovation, and how does it happen? The Internet is chockablock with definitions ranging from being curious and challenging assumptions, to inventing new things, to experiencing creative friction, to generating ideas. Some even say innovation is using associational thinking to mix concepts, which results in something new and different. Others say innovation is not about the ideas that bubble up, but the actions taken to convert those ideas into something of value to customers.

Most of the Forum's members practice some form of innovation—but it looks different for each of them. In chapter 22, the Accenture team of Dana Alan Koch, Michelle Webb, and Tanya Gibson bring innovative processes to life by making research and innovation a priority. They share this research process, which starts with clarity on purpose and what they refer to as the “great question.” Their research is conducted by a cross-functional team that has the right skills and strengths and uses a practical research methodology including collaborating

with external research partners and other internal innovation teams. In sharing their practice, they use one of the suggested communication tools: storytelling.

In chapter 23, Graham Johnston of Deloitte provides a variety of ways they not only “keep up” with innovation, but make it one of their core values. These processes enable the learning team to address the future of work and the distinct needs and preferences of the modern learner. For innovation to be pervasive, organizations must have a strong learning culture where learning is viewed as an enabler for individual, team, and organizational performance. The daily practices must drive engagement, connections, knowledge sharing, and collaboration across the entire organization. Human-centered design is one of the tools they have integrated.

Ann Quadagno and Catherine Rickelman of IBM share a variety of tools and techniques they use for innovation to keep pace with changes happening in the business in chapter 24. They recognized early on that there are many ways to be innovative, but their big takeaways include doing your research, ensuring a tight connection to what the business needs are, and continually getting more agile in how you develop and deploy your learning content. They provide their ideas and lessons learned about microlearning, bundling content, and design thinking.



Section 8

Leader Behavior and Practices

This section is a change in format. In the big scheme of the book, Forum members have shared their practices, cases, tools, and techniques all within the context of their individual businesses. For the chapters in this section, we interviewed 11 learning leaders representing a variety of member companies:

- Alissa Weiher, Cochlear
- Carmen Reynolds, Boeing
- Chris Holmes, Booz Allen Hamilton
- Cory Bouck, Johnsonville
- Heather Durtschi, Walmart
- Jay Erickson, Hitachi Vantara
- Jeremy Jones, Asurion
- Marguerite Samms, Intermountain Healthcare
- Randall Gross, PeaceHealth
- Terrence Morley, NBCUniversal
- Suzanne Frawley, Plains All American Pipeline

The goal was twofold. First we wanted to understand *how* they led other learning professionals. On a daily basis, how do they operate to enable what their team accomplishes? What would a fly on the wall see them doing, saying, and, if possible, thinking? The second goal was to delve deeper into how they personally practiced continuous learning. How do they keep ahead of the curve with all that is going on in the learning space and in the workplace in general?

Chapter 25 provides many examples of impact when leaders have informal and formal opportunities to interact with and support those they lead. These stories zero in on the many varied ways leaders create environments where others can excel in their respective roles and

collectively work together to positively affect business results. The ideas range from getting uncomfortable to being the player's coach; from being resourceful to focusing on the future; and from using a system's view to modeling servant leadership.

Because leadership is a journey that never ends and continuous learning is critical for everyone, chapter 26 focuses on the ways these leaders build their own capabilities by constantly reskilling, upskilling, and new skilling themselves. Some of the examples include using assessments to gain greater awareness of themselves and how they show up to others; self-reflecting to gain clarity on values, goals, and purpose; intentionally seeking and using feedback to make continuous improvements; and journaling to capture both thoughts and ideas.

Acknowledgments

The two of us often say that we have the best jobs in the world—serving as the hub for supporting senior talent leaders from more than 60 member organizations to connect, collaborate, and share their knowledge to leverage the expertise of the entire consortium. The companies that belong to the ATD Forum truly understand the value of supporting performance excellence in real time and simultaneously building capability for the future. Their common goal is enabling competitive advantage within their organizations by staying ahead of the ever-changing challenges they face. As part of the larger group, we also work very closely with an advisory group—a rotating group of senior leaders within the Forum community who have demonstrated personal leadership and volunteer to serve as strategic guides and a networking lynchpin for the consortium.

Members of the ATD Forum community support one another in a variety of ways. They build professional relationships that extend beyond the formal Forum venues, which expands their ability to share ideas, insights, practices, and suggestions. Many of these exceptional learning leaders have worked together for years and are open to constant experimentation. Thanks to the group's extensive comradery, newcomers are always welcomed with enthusiasm.

This book would not have been possible without this tightly connected community. For that reason, our first acknowledgment of gratitude is to all Forum members and leaders—over the past 29 years you have built a structure that allows this learning community to thrive. Our members come from a huge array of industries, sizes, and locations. Under the umbrella of talent development, they serve in a variety of roles. Each contributor has gifts they share within the Forum community, and we are so grateful and proud.

Our list of acknowledgments is long; more than 50 individuals from Forum member companies played a role in some aspect of the book's development. Most of the contributing chapter authors had

never written for public consumption, but they had a desire to share and the willingness to experiment and give it a go. Once they volunteered, we did what the Forum always does—collectively we created a working project plan and then tweaked it along the way.

When we began developing the content framework, we decided to give the authors freedom within that framework to write in their own style and use their own terminology to capture their experiences and stories. However, this freedom to write also presented challenges for some of our first-time writers. One question we heard a lot at the beginning of the process was, “What should a chapter look like?” Knowing that seeing a draft chapter would help to kick-start the writing process, we asked for volunteers to work with us to quickly draft a few chapters. Jerry Kaminski volunteered immediately. And later, when we bumped into roadblocks, we were fortunate enough to have the assistance of writer Chris Connors who helped ensure we met our deadline. We are grateful to both of them.

During the first draft writing phase we held weekly hour-long coaching sessions, which were divided into three basic parts: discussing the current status of the book, sharing writing suggestions and what each author was doing, and asking questions and following up on details. We were constantly amazed by how the participants all supported and helped one another. Someone would ask a question and others would offer suggestions, whether that was sharing resources and ideas or even collaborating on a chapter. Each web session was followed by an email summary, and all documents were posted in a Dropbox folder. This not only helped with the actual writing process, but also kept the energy high and built an esprit de corps within the group.

Since the essence of the book is leadership and what it looks like in practice, we decided that this would not be an authored chapter or two, but a broader collection of practices and actions. Thus, another major member contribution came from those who were willing to be interviewed by Chris Connor about their leadership practices—Alissa Weiher, Carmen Reynolds, Chris Holmes, Cory Bouck, Heather Durtschi, Jay Erikson, Jeremy Jones, Marguerite Samms, Randall Gross, Suzanne Frawley, and Terence Morley. This group of 11 senior learning leaders was very open—they shared examples of not only how they led their teams, but also how they continued to build their personal leadership skills. The stories they told and the wide variety of tools, practices, and techniques they use revealed that leading is a personal, continuous, and never-ending journey.

And still there were other Forum members who wanted to contribute to the book, but did not have the bandwidth to commit to writing as an author. Once we realized what the review process would require and the breadth of the subject matter, we again asked for volunteers. In true Forum fashion, we ended up with 12 reviewers: Amanda Gunter, Chad Peters, Chanda Binkley, Douglas Holt, Emily Isensee, Jennifer Chung, Kendall Mealy, Kevin Metsers, Lisa Gary, Lucinda Ehlen, Michael Bolen, and Richard Coco. The work they did was critical in providing clarity of content and in keeping to our very aggressive timeline.

By the time we held our 2019 Fall Lab, which focused on leveraging strategic tools, we had already finished writing the manuscript and had turned it over to our developmental editor. However, the case studies shared during the event were so thought provoking that we decided they needed to be included in the book. The presenters—Jill Carter, Mark Lemon, Susana Sipes, and Taylor Harlin—quickly agreed to be interviewed. We were able to take the case summary and presentation documents they shared at the lab, along with their interviews, and craft a new chapter. This became chapter 5.

Members who have joined the Forum since the book was written are interested in helping to spread the word and carry the book forward to the next phase. As with all major projects, writing a book takes a variety of strengths and much discipline, and the whole is definitely greater than the sum of the individual parts. The magic behind this project is the synergy that exists within the Forum community, which continuously connects, collaborates, and shares. Just like the excitement we have when members share their business challenge stories in a case study or at a lab, we are thrilled with this body of knowledge and expertise that we have created to share with all talent professionals, especially those leading the learning profession. But most importantly, we are appreciative of all the contributing members and the work they did to make this happen.

In addition to the Forum members, there were others who played a critical role. First and foremost was Tim Ito, our boss at the time, and former vice president for content and marketing at ATD. Tim understood and appreciated the essence of connecting, collaborating, and sharing within a consortium. He also recognized the unique elements of the lab’s experiential “skunk-works” type of design model. But most of all he grasped the wealth of knowledge and experiences the Forum’s members have and so willingly share. He initiated the development of member case studies and worked with the ATD Research team to make them a reality. When the need arose for a book covering the wide gamut of functions in the learning space, Tim knew where to go. Once we said yes, he served as a catalyst, a coach, and confidante.

As with all writing projects at ATD, our “go-to” person was the recently retired Pat Galagan. She was excited about the project, providing ideas, samples, and a connection to the “queen” of talent development publishing—Elaine Biech. Elaine provided even more resources and hints. To these two we are most grateful. As the book progressed, the entire ATD Press staff provided expertise to enable a publication-ready book on schedule.

The last shout out of gratitude is to our endorsers. When we requested their support, the world was normal, albeit within the VUCA construct, and our lives had a semblance of order and structure. By the time they received the uncorrected proofs to review, the world had turned upside down with the COVID-19 crisis. We truly appreciate that they recognize the work learning practitioners do on a daily basis to enable organizations to build performance capability and honored it with their support, even in this time of extreme disruption.

We appreciate everyone who contributed to this project—more than 50 percent of Forum member companies played a role. One of the sayings in the Forum is that we are always working to get better at getting better. This book is for the entire talent profession. The stories, examples, and actions will enable them to continuously get better at getting better with leading and guiding others. It will help them create and support work environments that are ahead of the curve, allowing learning professionals to become masters at advising and guiding business leaders on changes that influence the future of the organization—building people capability. An army of contributors made this book possible and validated their professionalism and interest in helping others to get better at leading and managing the learning function. To each and every one, we are extremely grateful and honored to be on your team.

—MJ and Laleh

About the Authors

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Alan Abbot realized the importance of effective instructional design a decade ago when, as an adjunct instructor at Indiana University Southeast, he was teaching a course for the second time in two semesters. The first time he taught the class, some of the students failed to grasp the relationship between some of the material. Without a complete schema, they struggled with some of the assignments. The second time he taught the class, he kept the same assessments, assignments, and material, but rearranged how he covered it. There was a full grade improvement across the entire class. Ever since, he's been interested in how educators can create and experiment with their learner-centric programs. These days, Alan's an instructional design supervisor at UPS in the talent management department. Previously, he's worked as an instructional designer and facilitator in the nonprofit and healthcare fields.

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Brandon Carson is the author of *Learning in the Age of Immediacy* (ATD Press, 2017). He is an award-winning, innovative, and highly focused leader with a progressive track record of learning strategy and execution. He has extensive experience developing global learning strategies for companies such as Apple, Microsoft, Yahoo, and Home Depot. He is currently the director of learning at Delta Air Lines. He holds an MEd in learning technology and design and a BA in business communications, as well as advanced ISPI certification in analysis. He resides in Atlanta, Georgia.

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Bryan McElroy is the senior manager of learning and development for Rush Enterprises, the largest network of commercial truck dealers in North America. Applying techniques learned working for more than a decade in the highest levels of film, television, and audio production in Hollywood, California, Bryan came to the L&D field focusing on creating compelling e-learning content. Having held many leadership positions, Bryan currently leads a team of L&D professionals who strategically supply the organization with all modes of training for all employees, from executives to high-potentials to new hires and everyone in between.

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Caroline Fernandes designs and develops learning solutions (face-to-face, live virtual sessions, and self-paced offerings on various platforms) for IBM. Her projects have included designing and developing employee enablement for the company's new performance management discipline and technology, enablement for industry sellers to build knowledge and selling skills for industries they serve, and programs to build employee skills in areas such as boosting personal impact, time management, and thriving on change. Caroline also leads a team of instructional designers, mentoring them on their learning consultancy and instructional design skills. Prior to IBM, Caroline worked as a senior instructional designer in

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Casey Garhart is a senior instructional designer with IBM’s Leadership, Learning & Inclusion group, splitting her time between work in diversity and inclusion and courses for technical leaders. Her work encompasses face-to-face and virtual classes, online learning, and ongoing activities designed to support learning. Some of her courses in the area of diversity and inclusion are available outside IBM. Casey has been designing interactive instruction for more than 30 years—starting with interactive videodisc in 1978. She has a PhD in instructional design from Penn State University and has taught classes at Penn State, American University, and the University of Wisconsin-Madison. Her work prior to joining IBM included creating materials for the hearing impaired, simulations for the military, and support for management consultants.

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Catherine Rickelman is a senior talent and learning solution architect for IBM Leadership, Learning & Inclusion. She has architected enterprise-wide solutions for IBM’s onboarding and recruitment programs for newly hired employees and executives, management and leadership development, diversity and inclusion offerings, and technical reskilling priorities. Catherine has been in the consulting and learning design space for more than 20 years. She has an MBA in international business from Rollins College.

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Chris Garton leads a team of learning and development specialists focused on delivery of training at Asurion in Houston, Texas. He partners with operations, workforce, design, and project teams to align resources and drive success among their newest employees. Over his past seven years with Asurion, Chris has gained experience at multiple levels and won the prestigious Superhero Award in 2016 for his dedication. He earned a BS in materials science and engineering from the University of Florida. While originally pursuing a career in the engineering space, he found that his passion for training and the positive culture at Asurion were too good to pass up. Chris enjoys nearly any outdoor activity, and you will frequently find him camping, hiking, working out, or traveling with his family.

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Dana Alan Koch has more than 30 years of experience in learning and talent development. In recent years he has focused on blending the best of cognitive science, brain science, and instructional science to build better learning programs, better learners, and better learning professionals. His team has innovated with immersive learning technologies, immersive game design, wearables for learning, AI content domain mapping, and chatbots for learning. Dana has been an integral part of the company's work in durable learning, building better learners, and learning in the future research. He holds several patents for his work in learning. Dana has a BA from Brigham Young University in organizational communications and an MA from Northwestern University's Institute for the Learning Sciences. He is a frequent presenter at conferences. Dana was a contributing author to *Big Learning Data* (ATD Press, 2014) and *ATD's Foundations of Talent Development* and *ATD's Action Guide to Talent Development* (ATD Press, 2018). He served as chair of the ATD Forum Advisory Group in 2013 and 2014 and served on both the ATD Public Policy Council and the editorial board of *CTDO* magazine. He regularly joins two colleagues—Bob Gerard and Jake Gittleson—to discuss learning topics on the *Learning Geeks* podcast. Dana is the proud father of three beautiful daughters and lives in St. Charles, Illinois, with his wife, Julie.

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David McGrath works with Grainger's largest customers helping them reduce their total cost of operations by improving productivity. This is achieved by applying his continuous improvement skills (Six Sigma Green Belt) and user design expertise. He works with a talented team to innovate and develop new products that are implemented across the organization. Due to his passion for creativity and new product development, he is currently completing an MS in product design and development management at Northwestern University's McCormick School of Engineering. His background in talent development, marketing, and ecommerce allows him to bring a broad perspective to any situation. Some highlights of his work in talent development include building a change management practice, program development and strategy (such as sales, product knowledge, and ecommerce), and international projects in South America and Asia. When he's not working David enjoys adventure and traveling, including high-altitude mountaineering.

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Elizabeth Huttner-Loan joined IBM in July 2019 as a senior learning designer, where she has worked on projects related to employee resilience and leadership development. Previously, Elizabeth was a Digital Learning Lab fellow with the MIT Office of Open Learning, and served as senior manager for online course development for the MIT Teaching Systems Lab. She designed and managed MOOCs pertaining

to educational transformation and technology. Elizabeth values creating meaningful online educational experiences with an emphasis on active learning. Before MIT, Elizabeth worked at the American Academy of Arts and Sciences. She holds a BA in government from Claremont McKenna College and an EdM in technology, innovation, and education from the Harvard Graduate School of Education.

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Emily Isensee works on the sales enablement team at Tableau, driving the learning and leadership development strategy for its sales team. Previously, she worked for Brave Leaders, Brené Brown's online learning community, helping organizations integrate e-courses into their talent development strategy to create braver leaders and more courageous cultures. She also worked on the learning and development team at the Bill and Melinda Gates Foundation, where she managed a foundation-wide, award-winning leadership development program. Emily's areas of expertise include leadership development, facilitation and training, sales enablement, change management, team development, curriculum design, employee onboarding, and program management and evaluation. She has an MS in organization development from the Graziadio School of Business and Management at Pepperdine University and is currently pursuing a coaching certification through Co-Active Training Institute (CTI).

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Graham Johnston leads the development strategy and innovation team within Deloitte's development and performance function, managing various initiatives that advance L&D for Deloitte professionals. As a learning strategist and performance consultant, he enables innovative, human-centered, and holistic development experiences that address business needs and drive individual, team, and organizational performance. Graham also provides consultative services and thought leadership to the development and performance teams to support their strategies and solutions. He serves as Deloitte's lead representative on several learning and development groups, and is regular speaker at related industry conferences. Graham was previously the talent development leader for Deloitte's federal practice, and prior to that was in Deloitte Consulting's human capital practice, providing talent management, organization development, workforce planning, and change management solutions for clients. He lives in Maryland just outside Washington, D.C., with his wife, son, and daughter.

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Jerry Kaminski leads the instructional design team and vendor management at Consumers Energy. He has more than 35 years of talent and organization development experience in a multitude of industries,

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Joan McKernan is a learning professional with more than 25 years of experience and skills in meeting the strategic business needs of talent development. She has a strong background in strategic planning for learning solutions, all phases of custom learning development, and creating leadership solutions. Her demonstrated experience includes working with internal and external global clients; working across commercial, government, and military industries; building development programs for a variety of talent audiences, including professionals, leaders, managers, and executives; applying the latest methods in instructional design, neuroscience, and agile practices; and employing a wide variety of learning formats. Roles in her learning career have included project manager, learning consultant, leadership development consultant, instructional designer, learning scientist, and team lead. Other roles include assessment coach and general learning mentor. She has also acted as a facilitator as well as presented at national conferences.

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John Kelly has more than 30 years of experience in organization development, coaching, training, and strategic business partner transformation for human resources and other staff functions. He has 20 years of experience as an internal consultant for organizations in the healthcare, manufacturing, and technical fields. He also worked as an external consultant helping a variety of corporations, agencies, and schools collaborate better and more effectively develop their leaders. He holds a BS in psychology from Xavier University in Cincinnati and is working on a master of organizational behavior at Benedictine University in Chicago. John also co-leads the Northwest Chicago Organization Development professional development network. He has experience in change management, culture assessment, HR transformations, coaching, strategic planning, performance consulting, and various other organization development specialties.

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Kozetta Chapman is a learning professional who collaborates with others to develop strategies that are effective, innovative, and transformative. In her current role, she is responsible for leading the technical operations training group, which creates curriculum, videos, and immersive technology components for team members. Kozetta has 20 years of experience in training design, facilitation, leadership development, change management, and inclusion and diversity. She has a bachelor's degree in sociology and a master's degree in human relations from the University of Oklahoma. Kozetta is passionate about helping others succeed and is heavily involved in mentoring, professional development, and coaching. Kozetta and her husband, Darius, reside in Texas where they enjoy relaxing with family and friends.

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Laura Solomon designs and develops leadership learning solutions (face-to-face, online, and virtual) as part of a global design team for IBM's 40,000 emerging leaders, managers, and executives. Laura's recent projects included designing and developing a corporate-wide initiative on positive leadership; transition programs for IBM's newly appointed vice presidents, managers, and middle managers; a microlearning series; an engagement toolkit; and a peer-to-peer development program on building trust-based relationships. Prior to IBM, she was an assistant vice president at Merrill Lynch, developing and managing leadership development initiatives for high-potential managers that included assessment, individual development plans, job rotations and mentoring. Before that, she was manager of training and development at Zany Brainy and Staples. Laura has a master's in education, instructional design, from the University of Massachusetts, Boston, and a master's of professional studies in art therapy from Pratt Institute in New York.

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Leanne Drennan is a senior consultant for talent development strategy and design at IBM Leadership and Learning. She leads the team creating distinctive development and learning experiences for IBM's global sales force, from onboarding new sales professionals to coaching sales executives. Focused on innovative, work-based learning, she and her team enable sales professionals to create client value and exceed sales targets. Her designs have improved the performance of IBM sales professionals and leaders around the world, and received recognition from ATD, Brandon Hall, and ISPI. After a 15-year career in sales, sales management, and sales operations, Leanne followed her passion to empower others to reach their maximum potential. She facilitated sales and client engagement education to a broad range of professionals in Asia, Europe, and North America. She earned an MS in education from Northwestern University, with a specialization in organizational behavior from the J.L. Kellogg Graduate School of Management.

Lisa Gary

Chief Learning Officer, Trane Technologies

Lisa Gary has more than 25 years of learning and development experience, working in financial, food, and manufacturing industries. She is passionate about learning and always applies a business perspective to the field. For the last six years, Lisa served as Ingersoll Rand's CLO and was responsible for developing enterprise strategic capabilities of leadership development, operational excellence, strategy and market analytics, product management, innovation, and sales excellence. She was also responsible for ensuring global learning strategies were aligned for Asia Pacific, EMEA, India, and Latin America. In March 2020, Ingersoll Rand split into two publicly traded companies, Ingersoll Rand and Trane Technologies; Lisa joined the Trane Technologies company as the CLO. She and her team are focused on building the next set of strategic capabilities as well as a reskilling and upskilling strategy. Lisa served on the ATD Forum Advisory Group in 2017-2018 and served as its chair in 2019. She has a BS in marketing from Virginia Tech and an MBA from the University of North Carolina, Charlotte. Lisa is a NeuroLeadership Institute Results Certified Executive Coach as well as a lifelong learner—tackling anything from blacksmithing to clogging. Lisa is the proud mom of a grown daughter and son. She lives in Cowan's Ford, North Carolina, with her husband and two rescue mutts.

Marie Wehrung

Director, Talent and Organizational Development, Rice University

Marie Wehrung is the director of talent and organizational development at Rice University in Houston, Texas, where she strategizes and oversees programs that drive organizational effectiveness and enable organizational, team, managerial, and individual success. She consults with individuals and departments to enhance workplace performance and provides professional development resources to meet organizational needs. Marie has a bachelor's degree in biological sciences from Smith College and a master's degree in human resources development from Texas A&M University–Central Texas. She's especially passionate about applying design thinking to the work she does and affecting lives through coaching. She's an active member of the ATD Forum, having served three years on its advisory group (one year as chair). She appreciates having the opportunity to give back to colleagues in the field that she loves. Marie lives in Houston with her husband, two daughters, and one cat.

Michelle M. Webb

Institute of Applied Learning Sciences Research Lead, Accenture

Michelle Webb has more than 18 years' experience exploring how to improve the Accenture talent experience. Through her appetite for voracious learning and application, Michelle has had the opportunity to research, experiment, create, and consult on a wide range of initiatives that have changed how people live, learn, and work. Her research has dived into topics including durable learning, personalized learning,

learning pathways, blockchain, virtual reality, leadership development, and futurism research. Beyond learning, Michelle is passionate about health and well-being, organization, reading, and spending time with her family. She lives near Denver, Colorado, with her husband and blended family of five kids.

Rachel Hutchinson

Director, L&D, Head of Global Portfolio and Community Management, Hilti North America

Rachel Hutchinson's passion is engaging people in change journeys while developing and empowering people. She is energized by solving puzzles—finding what is the root cause issue of performance, what are the biggest difference makers for the future direction of our organization, and how can we inspire people to bring their best ideas and best implementation to their daily work. With a CPTD and a master's in business administration, with an emphasis on data analytics from Oklahoma State University, Rachel believes that developing people is the biggest edge you can have over competitors from any industry. As a huge virtual team proponent, she manages a diverse global team from a mountain cabin in Colorado.

Ron Dickson

Senior Learning Specialist, Honeywell

Ron Dickson is a strategically oriented analyst and program manager focused on transforming learning and development through analytics, standardized measurement systems, and data-driven innovations. He serves as a senior learning leader at Honeywell Aerospace, where he recently was awarded the Chief Engineers Coin Award. He served as an engagement impact analyst at the nonprofit Experience Matters, and for many years was a measurement and analytics manager for Intel's corporate learning team. Ron was instrumental in the creation of the Workplace Learning & Performance Scorecard, the online real-time benchmarking and decision support tool maintained by ATD.

Sandi Maxey

Senior Vice President, Learning and Professional Development, Sandy Spring Bank

Sandi Maxey joined Sandy Spring Bank in 1999. Her current position is senior vice president and manager of the learning and professional development department. She is responsible for developing and executing the bank's enterprise talent strategy. Sandi's areas of expertise include leadership and management, coaching, career development, sales management, and the client experience. She has 30 years of banking experience with more than 25 years in learning and development. Sandi holds an AB in sociology from the University of Georgia, an MBA from Frostburg State University, and is a graduate of the Stonier Graduate School of Banking.

Sarah Siegel

Manager, IBM Learning Design, IBM

Sarah Siegel manages the learning design team at IBM and is a learning experience designer herself. In her management role, she aims to hire and engage the industry's most gifted learning experience designers to help upskill the workforce of today and the future. In her senior learning designer role, Sarah focuses on diversity and inclusion, including a groundbreaking course called Global Religion and Culture. She holds an MA in organizational leadership with a specialization in adult learning and leadership from Columbia University.

Suzanne Frawley

Director, Talent Management, Plains All American Pipeline

Suzanne Frawley, CHRS, CPTD, has a passion for setting people and organizations up for success. She is the director, talent management, for Plains All American Pipeline and leads succession planning, leadership and professional development, performance management, organization design, and talent acquisition. Suzanne's previous experience includes roles in leading learning and organization development functions and as a strategic HR business partner. She credits the ATD Forum for introducing her to design thinking, which she has incorporated into her projects, workshops, and meetings.

Tanya Gilson

Future of Work Researcher and Innovator, Accenture

Tanya Gilson has a curiosity for bringing new ways of thinking to the complex challenges within the ever-evolving talent landscape. During the last 15 years she has worked in a variety of strategic roles including talent transformation and optimization projects, leveraging technology to obtain data-driven insights, and bringing research-based innovation to recruitment, onboarding, learning and talent development, and performance. Most recently, Tanya has been exploring the effect of compassion in the workplace, how we will be learning in the future, and what the next generation of recruitment will look like. With a love for continuous learning, she is developing new skills in foresight research, kitesurfing, the science of well-being, and growing Japanese maples. She lives in Nelson, New Zealand, where she enjoys spending time in the wilderness and walks on the beach with her partner and their dog.

Teri Lowe

Training and Development Manager, UPS

Teri Lowe has more than 30 years of experience as an educator and learning and development professional. She has worked for the past 20 years for UPS in various technical writing, instructional design, and leadership and talent development roles. Teri's current role is as a training and development manager whose team is responsible for the project management, design, development, deployment, and measurement of

company-wide leadership training. She has been an active contributor to UPS's learning strategy, content strategy, leadership development strategy, measurement and evaluation strategy, learning leaders collaboration, and enterprise learning initiatives. Teri has a PhD/ABD in rhetoric and composition from the University of Louisville, an MA in English from Cleveland State University, and a BA in psychology and sociology from Ohio Northern University. Teri is an active member of the ATD Forum and serves on the Advisory Group.

Terry Copley

Head of Solutions and Experience Management, Hilti

Terry Copley is a champion of using performance improvement to grow bottom-line performance and achieve outstanding results. He prides himself on being a self-starter who is willing to go above and beyond to get the desired results. Terry is a proven coach, facilitator, and leader in sales training, and makes sure that he keeps his facilitation skills sharp. In his current role, he is responsible for leading the teams that design and implement 70-20-10 programs that facilitate closing skills gaps. His goals are to provide the professional development and continuous learning of team members to increase engagement, improve Hilti's ability to recruit top talent by offering best-in-class development opportunities, and overall to achieve specific business goals. He loves to be creative and thinks in pictures or images that tell a story, so he tries to make time to stay involved enough in Hilti's projects to bring his creativity into play.

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