

Partnering Up

WLP professionals must develop a rapport with senior executives.

By Meloney J. Sallie-Dosunmu

WORKPLACE LEARNING and performance professionals strive for that elusive seat in the boardroom, but what they struggle with is how to get that valuable seat.

Learning executives who effectively master the skill of partnering up are the ones who gain access and deliver results on a higher level. Partnering up is about proactively building relationships with the senior executives in your organization—one executive at a time—by understanding their drivers and goals, and aligning those relationships to create company value using workplace learning and performance.

Effective learning leaders drive change in the organization. To prove value, they must take a seat as a player. As the roles of WLP professionals evolve, the need to become more strategic and more closely aligned with executive leadership also increases.

Know the strategic plan

According to Bob Weigand, director of management training and development for St. Lukes Hospital and Health Net-

work in Bethlehem, Pennsylvania, partnering up is an important part of his job.

He is responsible for developing future leaders at the 6,000-employee medical system in the midst of nursing shortages, changes in government policies that impact reimbursement, and other industry complexities. To keep his finger on the pulse of the changing needs, he oversees a Leadership Steering Committee, which is a diversified team of physicians, nurses, and other medical leaders in the hospital.

One of Bob's primary objectives is to ensure that St. Luke's leaders are prepared for the future of the healthcare industry, while responding to current needs. To compete in the industry, solid leadership is a strategic advantage.

"Partnering up is a must," he says. "You can't operate in the blind. You need to understand the mandates of the CEO and know the strategic plan. You need to know it, be able to communicate around it, and set all of your goals to drive it."

Not all learning leaders know how to establish solid executive-level partnerships. While it takes time and effort,

learning leaders should follow five basic steps to develop those partnerships.

Understand the political horizon. Each organization has an official organizational chart that delineates the divisions, departments, and hierarchy. All WLP professionals must have a clear understanding of this organizational chart.

However, there are also unofficial relationships and influential structures that the WLP professional must understand as well. These are sometimes more complicated and take more time to learn because they entail seeing the organization behind the organization.

Understanding the political horizon involves learning the business and personal objectives of the key players you need on your side. It means knowing how decisions are made, who the organizational influencers are, and who in the executive suite has an appreciation for workplace learning and development. It also means being aware of organizational boundaries and integrating interests to meet the objectives of the executive leadership.

A WLP professional who is savvy in

FACILITATING ORGANIZATIONAL CHANGE

navigating his organization's political horizon and understanding the formal and informal decision-making process is aware of the networks of influence across the business. She also knows enough about the culture and values to align the learning or change strategy to create win-win results.

At St. Lukes Hospital and Health Network, Weigand uses his Leadership Steering Committee to stay abreast of the political horizon. The council members are in positions of influence, so they have a clear handle on how to drive decisions and change throughout the business. Since they represent a range of disciplines, they are clear about the needs in the different parts of the organization, as well as the official and organizational needs. By working through this leadership council, Weigand ensures that his learning objectives meet the needs of all leaders.

Present yourself as a business partner. In its purest sense, the definition of a business partner is one who participates in the daily operations of the business, shares in profit and loss, and takes personal responsibility for the partnership's debts and liabilities. While the WLP professional may not actually be responsible for paying off business debts, he must be personally concerned with all business aspects.

A business partner must adopt a business language and framework for communicating workplace learning and performance initiatives according to the organization's approach. In other words, don't use training and development jargon to present your activities. Instead, be ready to communicate your proposals, ideas, and initiatives according to how it drives the strategic direction of the organization. Take a consultative approach, and frame your work in the language of the business. Take interest in all aspects of the business and figure out how to align your work to grow the human capital skills that drive business results.

Richard Fletcher was recently promoted to senior director of organizational development for Zaxby's, an innovative "quick casual" restaurant

chain in Athens, Georgia, that strives to serve fresh chicken fingers and buffalo wings in a fun atmosphere where food quality is of the utmost importance. Fletcher, who was brought in three years ago to develop a world-class training and development function, oversees learning for Zaxby's 341 units in nine southeastern states.

As a business partner, Fletcher held himself personally responsible for the support of Zaxby's growth initiative. He has ideas about what it takes to operate as a business partner.

"The company was trying to grow from a small to mid-size business to a large one," he explains. "I needed to align with that objective. I needed to listen and see what the needs were and then deliver results. Do what you say you are going to do, with high quality. Communication is also important throughout the process. It needs to be succinct and clear. Every piece of communication is about how you are helping them meet their objectives."

Fletcher believes that the way he communicated and interacted with the executives at Zaxby's contributed to their perception of him as a business partner. He started by discovering the executives' needs. Even though he already had some ideas about what learning initiatives were needed, he took the time to understand what the executives were grappling with and what they needed to succeed in their individual areas of the business.

He also needed to understand the rapid growth strategy, which resulted in Zaxby's growing almost 300 percent in three years. Once he had that understanding, he was able to use what he learned to deliver learning initiatives that helped prepare employees for the growth and rapidly bring employees and franchises in line with the rapid growth.

Fletcher also felt his behavior as a professional helped him secure the role as a trusted business partner.

"Do what you say you will do with high quality," he says. "Then, provide communication and updates regularly. But don't waste time. Be succinct. Only then can one garner the trust that is

needed to build rapport. Once you have established a regular opportunity for communication, it is essential that you demonstrate that you are there to help the organization, and not to dictate or do your own thing."

Build the relationship. Effective partnering up is not instantaneous. As with any effective learning activity, it is a process that needs to be planned and executed over time.

To establish a partnership at the executive level, you must gain the trust of the executive leaders. This trust evolves one person at a time. Identify the key player you need to align with first, and then work toward building a rapport with him. Once you have proven yourself, this person can help you establish a rapport with other executives.

Fletcher used this approach to achieve his success at Zaxby's.

"Show your value first. Find out what they need, and then ask for more access and communication as you show results and value," he says. "With my experience in business, I have learned to be less aggressive and more careful when trying to develop a relationship with executives at the higher levels. You don't barge into the executive suite and say 'you should do this' or 'you need to do that.' You need to make the case and deliver.

"Before I suggest anything, I take the time to make sure I have all my ducks in a row," he adds. "They are not interested in quantity but quality. Zaxby's believes in quality, and so do I. My entire first year was spent onboarding and learning."

Part of starting small is working through your direct supervisor. Fletcher started out by asking permission from his direct supervisor, who happens to be the chief operating officer, to access the CEO and CFO. He wanted to ensure that the rapport he was developing was not only for him, but for the entire learning function. So he worked through his boss to gain the necessary access, and then requested opportunities for him and his staff to conduct regular presentations with senior executives.

Fletcher uses the presentations to keep the executives informed of progress, ensure ongoing alignment, gain credibility for himself and the learning function, and establish partnerships between employees and the executive team. Each presentation enhances the existing up-level partnership between the learning function and senior executives.

“The executives can see that all of us are in this together, which builds confidence and trust,” Fletcher says.

Deliver results. Establishing a strong executive-level partnership does not matter if WLP professionals fail to deliver and communicate results in business language. This is, perhaps, the most challenging aspect of the partnership.

In the February 2006 issue of T+D, an article cited research conducted by the University of Pennsylvania and ASTD. This comprehensive research study profiled 153 learning executives, including 92 chief learning officers with a budget of more than \$1 million and companies with more than 100 employees. According to the survey, CLOs cited communicating and measuring value as their primary workplace learning and performance challenges.

WLP professionals who wish to establish and maintain strong executive-level partnerships must move beyond activity and deliver measurable results that matter to the business. Evaluation strategy needs to describe more than attendees, training hours, or programs completed. Learning executives must be prepared to use Kirkpatrick’s four levels of evaluation (Level 1—reaction, Level 2—learning, Level 3—application and Level 4—impact on business results) to demonstrate the value of the training.

By measuring and communicating the value of the learning, the WLP professional will enhance credibility and communicate value.

Follow up. The learning leader is never finished partnering up. The relationship is never strong enough. Just as leaning is an ongoing process, so is partnering up.

To ensure ongoing success, the learning executive must continue to network with the C suite to stay focused on what

is important to the business. Find a strong mentor who can help you continue the process. When you feel that you have a good relationship with one executive, ask her to help you build a relationship with another.

Partnering up can make the difference between effective ongoing learning and programs only offered on demand. Effective executive-level partnerships can be established if you understand the political horizon of your organization, present yourself as a business partner, start small, and build relationships one at a time. **TD**

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