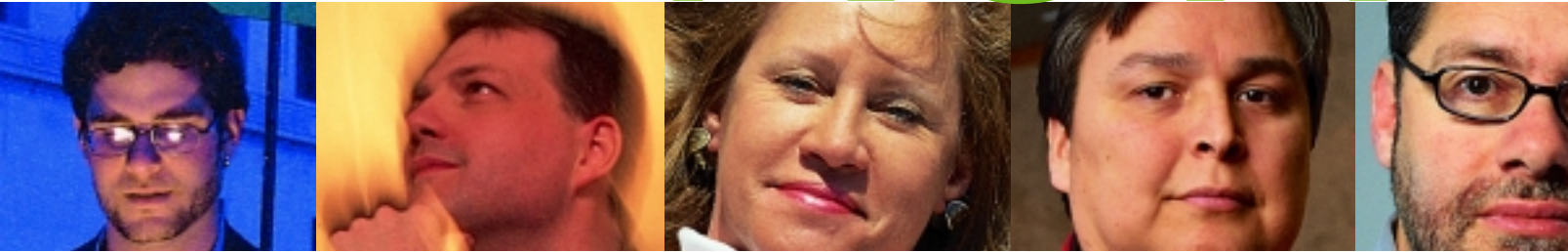


Training's New



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Once a year, we showcase a small group of people who embody the new spirit we see breaking out in the training profession. They're not necessarily new to the game, but they definitely play it differently. They're entrepreneurial, in some cases literally. **Michael Margolis**, fresh out of college, runs CitySkills, a catalyst organization for numerous urban training companies, such as HomeBoyz, that teach Web-related skills and place graduates in tech jobs. The new guard thrive on risk. **Clark Aldrich** left a perfectly safe job as a respected

market analyst at Gartner to found and serve as chief technology officer at a training software startup exploring game theory.

The new guard also take on sacred cows. **Toni Hodges**, working for Verizon, is an army of one fighting to invent and apply new ways to measure the return on a training investment. Several do work that knits together unlikely allies. **Bob Joseph**, a hereditary chieftan of the Gwawaenuk tribe, KwaKwaKa'wakw people, builds bridges between a Canadian utility company and the aboriginal peoples living on

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reserve lands through which the company runs its power grid. **Steven Forth**, another Canadian, is steering a movement among competing Canadian training companies to develop and apply much needed interoperability standards. **Peter Jones** accomplished the remarkable feat of bringing together 14 different training units from two merged megabanks to build a decision-support tool and to select and use an LMS. **Peg Maddocks**, a theater major turned trainer, produced dramatic results with e-learning at Cisco long before its CEO proclaimed e-learning the

Internet's next killer app. **Rebecca Chan Allen**, a cancer survivor, has used the epiphanies of that experience to change her own life and that of her clients. **Sam Shmikler**, CEO and Action Figure (yes, his actual title) of the Periscope Organization in Beverly Hills, likens what's happening in e-learning to the evolution of filmmaking in Hollywood and is exuberantly on the forefront of challenging training tenets and shaping the e-learning field.

We'd like you to meet them here....

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By Pam Leigh

Clark Aldrich

Art imitates life

Aldrich's Hollywood venture left him with a love of fiction writing, which he exercises by producing (up to now) one desk-drawer novel a year. His themes revolve around the stuff of his work world and his heartfelt cause to improve education. One plot pivots on what would happen if an outsourcing firm tried to privatize education? OK, so it's not Raymond Chandler, but Aldrich does find drama in the barriers and issues.

Aldrich and his wife Lisa homeschool their seven-

On the surface, Clark Aldrich's nonlinear career path seems more a matter of serendipity than strategy. But once the dots are connected, a solid foundation—indeed, even a metaphor—begins to emerge.

In what he describes as his “yin yang” background of employment, Aldrich interned at several advertising agencies during summer breaks from college. In 1989, he earned a B.S. in artificial intelligence from Brown University and, along with a few friends, started a small cable TV station. Writing and directing his own sitcom led to a Hollywood stint as a scriptwriter. Next, he was a speechwriter at Xerox, a job he describes as “great fun, largely spent writing while sitting backwards in a limousine or corporate jet.” That gave him the chance to research at Xerox's PARC facility.

Aldrich then became an e-learning analyst for Gartner. “As an analyst, I became excited about e-learning, but I also came to understand its limited ability to make content personal. Of course, what e-

RD NEWGUARD Clark Aldrich/CTO and Co-founder/SimuLearn, Inc./Cambridge, MA/Age: 34

year-old son—kind of like having a personal education petri dish in which to grow the culture of an engaging school curriculum.

“Right now,” says Aldrich, who himself exhibits the head-long energy and pell-mell lope of a kid, “I'm using Excel to teach some of these home-schooled kids who aren't math enthusiasts how to do really cool things with graphs and numbers. As with adults, it's exciting to figure out how to leverage the natural interests of kids for maximum learning!”

learning has done well is to make broad-based information accessible to everyone in an organization. And what I became fixated on was how we can do both—make the e-learning experience both broad and personal. If we can't do that, it's not going to be truly transformational.”

At that point, the pieces of Aldrich's career puzzle began to interlock. From advertising, he'd learned the persuasive power of emotional buy-in; from Hollywood, he learned about effective storytelling; from Xerox, he learned the finite boundaries of computers and how the world of business works; and from Gartner, he deepened his e-learning knowledge. Along the way, Aldrich developed a passion for improving education, which he terms “the biggest challenge of our century.”

Now on sabbatical from Gartner, Aldrich is chief technology officer and co-founder of SimuLearn, Inc., a company attempting to do what many people say can't be done—teach soft skills, *really teach soft skills*, via technology. The startup has attracted a few

continued on page 62

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Rebecca Chan Allen

Four-part harmony

In 1993, a brush with cancer served as a wake-up call for Allen to slow down and savor life. “That experience was a blessing because I had a chance to rethink my life and nonstop work.”

Soon after, she formed a self-directed “journey circle” with a group of supportive women. They continue to meet four times a year to reflect on and share their lives. Allen has also achieved balance by dividing the year into four distinct parts:

“I devote one quarter to creating a product or conducting research or writing, one quarter to delivering my services, another to traveling, and the final quarter to connecting with my family and friends.”

Allen talks about a trip with her husband in 1998: “We drove our motor home down to New Orleans for a conference at which I was presenting. We combined that trip with a camping

vacation in Texas, meeting wonderful people and seeing how they live, and just being part of life. Along the way, we did some research in local libraries and wrote. For us, it has become an integrated way to live and work.”

Cultural epiphanies, synergy mandala—what language is Rebecca Chan Allen speaking? Answer: One that’s a powerful change agent for organizations and individuals alike.

As a learning facilitator, coach, and organizational consultant, Allen brings her multicultural experience and knowledge together to help effect transformational change. But the tools she uses may strike some people as unconventional.

“I’m attracted to innovation and synergy, which I view as integral to change and creativity,” she says. “I use a mix of different disciplines, such as mythology and New Science (including chaos theory and quantum physics) to create cultural epiphanies.”

“These epiphanies are revelatory insights that arise from cross-cultural interaction and learning. Because today’s business environment is so complex and fast-paced, it’s important for companies to develop the capacity to experience these epiphanies. I try to help clients make quantum leaps in expanding their cultural boundaries.”

Out of those multiple cultural perspectives, paradigms shift and a new whole is created. Though Allen’s approach to transformation sounds exciting, it may seem impractical to some people. Be assured: She can make ephemeral theory concrete.

“Whether I’m working with a CEO or front-line support staff,” says Allen, “I take complex but stimulating ideas and provide a guiding template—steps that they can take to create their own unique path.”

For example, in her Seven Synergy Steps work-

shop, Allen explains why synergy is important for organizational and individual growth, and she presents a seven-step Synergy Mandala to help create it. After a few examples, each participant has a hands-on experience with the mandala, using it to create synergy with a partner. Allen concludes the workshop with more practical tips on how to use the seven steps, which are covered in her forthcoming book *Guiding Change Journeys*.

JARD NEWGUARD Rebecca Chan Allen/President/Delta Learning Organization/Alberta, Canada/Age: 50

continued on page 62

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Steven Forth

Sailing takes him away

Forth, a voracious reader, loves to spend time with his family and race sailboats. He sometimes goes sailing for weeks at a time.

“Sailing allows me to get away from language for awhile. It puts you in a different timeframe, and you’re exposed to different stimuli than you are in the work environment. There’s the immediacy of thinking about where the boat is going, and there are the forces of wind and waves. That’s what makes sailing such a beautiful experience. I dream of one day sailing from Vancouver to the Galapagos Islands.”

Looking back, Steven Forth cites two major influences that have shaped his life: growing up bilingual in Montreal and his high school French teacher.

“I realized early on that English was not the only language and that it was important for me to communicate in more than one language in order to function safely and successfully.”

As for the teacher, Forth recalls, “Here was a refugee from the 1958 Hungarian uprising with a Ph.D. in linguistics. He could have made significant contributions, but he wasn’t given much opportunity in the society we’d created in North America.”

Those formative experiences became the foundation on which Forth would build his career. After graduating from Carleton University in Ottawa when he was just 19, Forth decided to spend a year in Tokyo teaching English before going on to grad school. He didn’t return to Canada until 10 years later.

While in Tokyo, Forth married Yoshie Hattori, a Japanese textile designer, and worked for three years as a translator for a large Japanese securities company, which yielded another piece in his emerging multidimensional career. “One of the most valuable things I

WARD NEWGUARD Steven Forth CEO/DNA Media/Vancouver, British Columbia/Tokyo/Age: 42

learned was how Japanese companies work internally. I also learned how to help non-Japanese people understand Japanese issues and vice versa.”

In 1985, Forth went freelance and, in addition to continuing to work as a translator, took on the challenge of adopting North American-developed software for the Japanese market. Four years later, Forth and his family left Japan and moved to Vancouver, a city they chose for its multicultural makeup. It’s at that point that Forth’s background and experience melded.

“In the absence of finding a company that I wanted to work for, I started DNA Media. I did that partly to give me a job and partly to provide an opportunity for people like my former French teacher—recent immigrants who have a lot to offer but who often meet closed doors.”

Indeed, DNA’s staff runs a cultural gamut: Chinese, Canadian, Czech, Japanese, Dutch, French, Korean. . . . “We only hire people who are open to working with

continued on page 63

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Toni Hodges

Like mother, like daughters

When asked about her non-work passions, Hodges laughs.

“Well, the good news is that I’m very passionate about my work. But as a single parent, it was especially tough to create and maintain balance when my daughters were young. Now that they’re grown (Tammy is an assistant state’s attorney in Montgomery County, Maryland, and Paula, like her Mom, works for Verizon), we’re able to pursue our passions of downhill skiing and sailing on the Chesapeake Bay when time allows.”

When Toni Hodges mentions that her staff consists of a half-time assistant, at first you think she’s kidding.

This is a woman who was named “Practitioner of the Year” in 2000 by the ROI Network. The award was given to Hodges because she manages for Verizon some of the most ambitious measurement work now being conducted in training and e-learning. This feat is no mean trick given Verizon’s size, which grew from 60,000 Bell Atlantic employees in 1998 to 120,000 when merged with Nynex and now more than 320,000 in its merger with GTE.

Hodges’s accomplishments are even more amazing when you consider that when she arrived at Bell Atlantic six years ago, there was no evaluation system to measure training, despite the millions of dollars being spent on interventions. What she developed, and what has put her on the evaluation map, is an entire process that gathers and reports data: participant reaction to test results, on-the-job performance, and financial return. Hodges developed a unique way to gather participant feedback that’s a quick strategic measurement for learning programs. Its success turns on reasonable evidence, as opposed to hard proof. Hodges is particularly proud of the questions she developed and tested.

JARD NEWGUARD Toni Hodges/Manager of Measurements and Evaluation/
Verizon Communications/Silver Spring, MD/Age: 51

“When we compare the percentages given by participants with the percentages given by supervisors, they’re almost identical. So, we’re comfortable that the data is good.”

With those studies, Hodges is able to determine the exact influence that training—versus other factors—has had.

“If we learn that participants believe the training had a 30 percent impact on their success in installing ISDN lines, for example, but that the coaching they receive from their supervisors accounted for only 2 percent, we know what area needs improvement.”

Hodges also developed a process called return-on-expectation, which elicits from chief stakeholders estimates of financial benefits. In the ROE process, each stakeholder of a particular training program is asked to put a percentage estimate on the

continued on page 63

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Peter Jones

WARD NEWGUARD Peter Jones/Vice President, E-learning/J.P. Morgan Chase & Co./New York/Age: 40

Par for the course

Jones, an avid golfer, travels on business about one week each month.

"I like trying out different courses, so I often take my golf clubs with me. I enjoy the challenge of the game and the solitude and stillness of a golf course." Jones and his wife have three kids—ages 7, 9, and 12.

"I've been on the PTA for six years, and I coach soccer for seven-year-old girls." Able to play acoustic and electric guitars, Jones admits: "I've been known to play at children's birthday parties!"

"Are you starting to see a pattern here?" Peter Jones quips, after reciting a litany of bank mergers that he has been involved in—three, to be precise. No wonder Jones's abilities for implementing e-learning platforms in large, merged organizations are well known and respected. The latest merger, as of this past January, is the Chase Manhattan Corporation with J.P. Morgan.

Being a seasoned merger warrior comes in handy with Jones's latest challenge: creating one e-learning platform from two very different systems for a combined banking institution of more than 102,000 employees. But that's getting ahead of the story: the process that has earned him the reputation of an e-learning strategist.

Three years ago, Chase Manhattan's training department, where Jones worked as technology training manager, decided to implement e-learning.

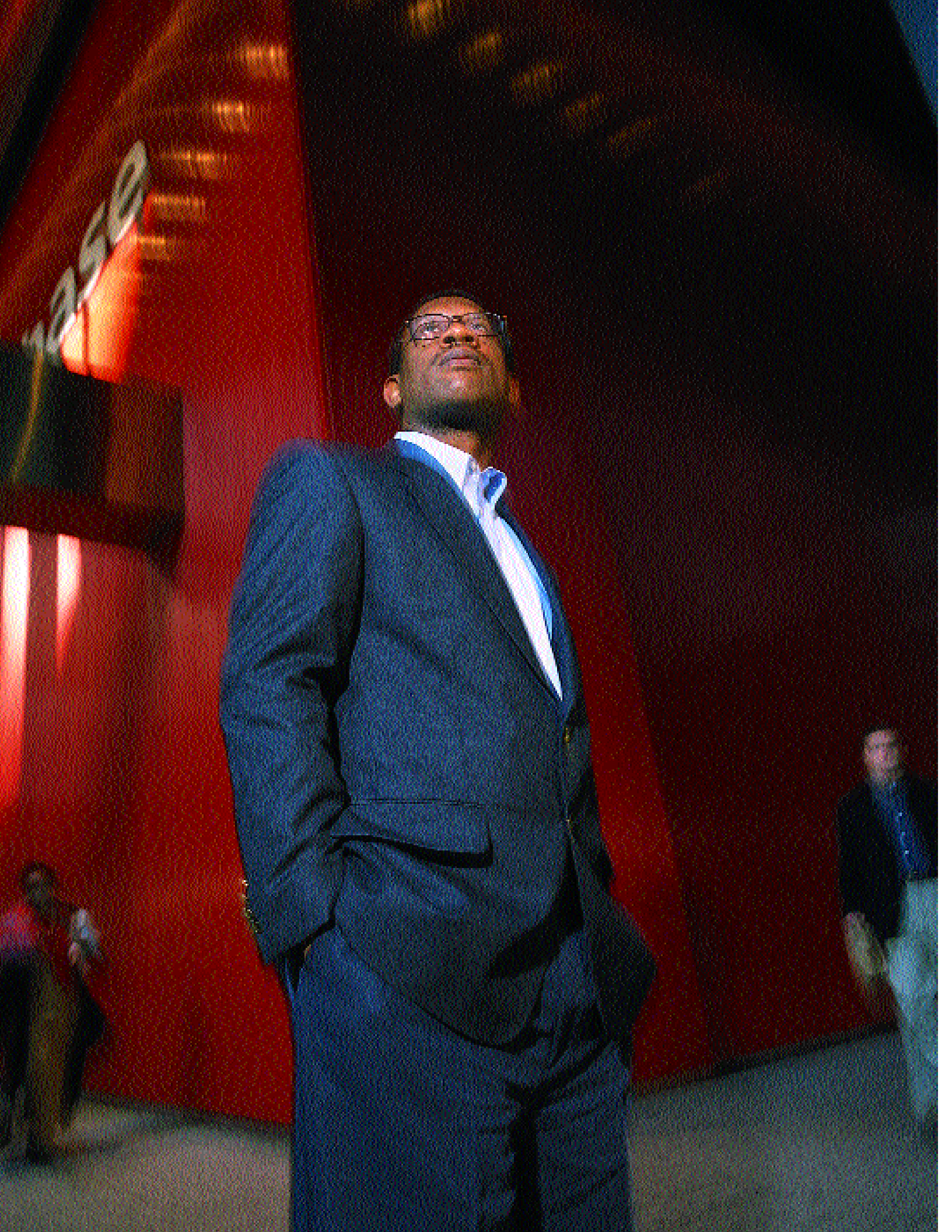
"Many companies put a system in place and hope that people will use it—the old 'build it and they will come' theory," says Jones. "But we took a very different approach. For starters, we had 14 training departments, each with its own budget and area of concentration. We got representatives from those departments to think about the various ways learning could be delivered and how the reps could leverage their best practices and experiences across the organization."

Out of that collective brainstorming was born the *Learning Choices* decision-support tool—a flexible, enterprise-wide system of automated decision making. The tool uses navigators and color schemes to help managers determine which type of learning option is the best solution for a specific need. Consisting of five knowledge areas, one option enables users to view initial considerations for a needs analysis and enter data to help determine a learning choice—from e-learning to classroom to CD-ROM.

"After a year," says Jones, "we observed that the way the training departments looked at learning had shifted. Defining goals and analyzing approaches had resulted in more informed decisions being made."

continued on page 66

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Bob Joseph

Sometimes, it's easy to forget that what seems natural and right today might have met with resistance only yesterday. Such is the case with Canadian businesses that are building positive relationships with aboriginal peoples.

Bob Joseph, manager of cultural relations and training for BC Hydro, a major utilities firm whose power lines cross aboriginal lands, explains:

"Prior to the 1980s, Canadian companies focused only on protecting their business interests on Indian Reserve Lands and thought they needed to deal solely

VIGUARD NEWGUARD

Bob Joseph/Manager, Cultural Relations and Corporate Training/

Department of Aboriginal Relations/BC Hydro/Vancouver, British Columbia/Age: 37

So many fish, so little time

"My tribal community are canoe people, and I'm at home on the water," says Joseph, who is a member of the Gwawaenuk tribe. Even though he has access to many great places to fish, Joseph doesn't get to pursue this pastime as frequently as he'd like.

"I usually fish over the Christmas holidays and for a week during the summer. In winter, I fish a type of trout called steel head. In the summer, I fish salmon."

Joseph describes the lure: "By the time the boat pulls away from the wharf, I turn off the rest of world. Part of the adventure is never knowing what's going to happen. But if something bites, I'm a hero and there's something delicious to eat—like last summer when I caught a 42-pound salmon and I was only in a little rowboat!"

with government officials. But in the 1980s, certain changes occurred in Canada's Constitution that made consulting with aboriginal peoples not only good public relations, but also a legal requirement.

"Until the time that the rights of First Nations peoples were constitutionally protected, there wasn't a lot of incentive to devote any effort to facilitate relations with aboriginal communities. But in 1991, BC Hydro recognized the importance of fostering cooperative relations and established the department of Aboriginal Relations."

About the time that BC Hydro was launching its then one-person department, Joseph was working as a sports fishing guide and had just completed a two-year program in business administration at Camosun College. "I was always focused on a business career because as the heir to a hereditary chieftainship, one of my major responsibilities was to generate wealth and redistribute it to my community."

One day in 1991, Joseph set off with a gentleman on a fishing trip. "On the first day out, the man asked me what I did when I wasn't working as a guide. Then every few hours over the next several days, he barraged me with questions: *What can you offer a company that it would be interested in? What kind of education do you have? What kind of computer courses have you had?* and so on. At the end of the trip, the man handed me his card. He was the senior human resources manager for BC Hydro, and he asked me to call to arrange for an interview the next time I was in Vancouver. I learned later that the preliminary interview had been

continued on page 66

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Peg Maddocks

Peg Maddocks laughs when asked how a former theater major became an instructional designer.

“It certainly wasn’t my initial plan! I was going to be a world-famous movie director. But while I was figuring out exactly how to accomplish that goal, I took a job as an elementary teacher directing a program for underachieving gifted children.”

Maddocks soon became frustrated with the way the public school system treated high-IQ students, which drove her to graduate school for a degree in educational psychology. There she discovered the world of corporate training and instructional design. Maddocks’s first post-grad job was as a training manager for General Motors, where she learned about measurement, ROI, and how to solve business problems. Then she went on to Cisco Systems. It’s there that her work is becoming the stuff of legends.

HARD NEWGUARD Peg Maddocks/Senior Manager, Learning Tools and Solutions Group/
Cisco Systems/San Jose, CA/Age: 49

Behind the scenes

Perhaps it’s Maddocks’s 11-year-old son who will realize her movie-making dream.

“We just got *LegoStudio*, which is a movie-making kit created by Steven Spielberg and Lego. Within 30 minutes, my kid was making a movie—editing, cutting, creating the music, doing voice-overs. And he didn’t need training!”

Another passion for Maddocks is ice hockey. “Maybe it’s because I was a figure skater growing up, but I’m sometimes at a Sharks game three nights a week. So, that must be my hobby.”

“I was initially hired as a training manager in manufacturing by Stratacom six months before Cisco acquired it. At the time, there wasn’t a training department in Cisco’s manufacturing division. I knew I had to justify more formal training for the division, but I lacked a budget and had only one assistant. So, I skunked a team from the cost-accounting department to examine manufacturing losses that could be related to training problems.”

About eight projects were earmarked for process improvement. The first was dubbed Return to Vendor. The challenge: The system for returning upgraded PCB boards to vendors was paper-based, time-consuming, and fraught with errors. The goal: Automate the entire process and save \$1 million per quarter. Maddocks was given three months to implement a training plan that would make the whole thing work. Long story short: She wrapped it up in 10 weeks, and the projected \$1 million in cost savings was delivered the next quarter.

Maddocks turned her attention to Cisco’s customer training department. This time, she was given a budget and a staff of 45. The challenge: The group in charge of course development and production had been decimated by an absentee manager. The

continued on page 67

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Michael Margolis

Groove thing

Although at this time CitySkills is “a full-time job times two,” Margolis tries to weave in some nonwork activities. “When I’ve spent too long in the eye of the storm and need to recenter myself, I go to a retreat in the Berkshires where I can hike, eat delicious, healthy food, and practice Hatha yoga.” Another restorative pastime is travel: “For me, travel is the chance to experience a different culture, even if it’s just going to another city for a weekend. Every city has its own feel, its own DNA. It gives me perspective to be in a new environment. Also helpful is any music with a groove to it—like jazz, blues, or R&B; it never fails to energize, focus, and enhance my productivity.”

The ink on Michael Margolis’s college diploma had barely dried before he was out exercising his entrepreneurial bent and desire to tweak the status quo. Margolis received his bachelor’s degree in cultural anthropology from Tufts University in May 1998, and by the following October was a founding member of Volunteer Solutions—an online search engine to track volunteerism. That startup, which was ultimately sold to United Way to become its technology platform, is the only not-for-profit company to ever win MIT’s 50K Entrepreneurship Competition. Although Margolis didn’t know it at the time, that honor would soon open doors for a brand-new startup on his entrepreneurial horizon.

A year before Margolis graduated, CitySoft, a Boston-based, Web-development company whose raison d’être was to hire employees from urban neighborhoods, was founded. It quickly became a blueprint for other companies that wanted to emulate its hiring model. Margolis, like CitySoft’s founder Nick Gleason, wanted to help solve the challenge technology poses to society and the economy.

“In this fast-moving IT market,” says Margolis, “industries across the board are urgently in need of IT

WARD NEWGUARD Michael Margolis/Co-founder/CitySkills Inc./Boston, MA/Age: 23

talent. As of now, more than 65 percent of all jobs in the United States require a knowledge of computers. We knew that urban communities represented an unrecognized and untapped source of Web talent.”

In early 1999, Margolis and Gleason teamed up and turned their common vision into CitySkills, a U.S. catalyst organization for urban training companies that provide Web-related job training. CitySkills Digital Workforce Alliance comprises eight organizations that are pioneers in training and placing urban workers into Web jobs. Alliance members offer a wealth of expertise and leadership for the countless other similar programs starting up across the United States.

continued on page 67

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Sam Shmikler

Take 2: Action!

In addition to analogies, Shmikler likes to cook up some food. He specializes in Italian and Asian cuisine, fish dishes, and homemade ice cream. “My M.O. with a new recipe is the first time to stick fairly close to the way the creator wanted it, then deviate the next time.” Orchestrating a complete dining experience, says Shmikler is “a matter of sequencing and staging.”

Then there are the high-speed stunt kites that Shmikler started piloting six years ago. Keeping the powerful, high-tech kites airborne takes skill. Says Shmikler, “The magic lies in the subtlety of the moves, not in the dramatic large gesture.”

Up periscope! Eye on Sam Shmikler. It's sure not hard to spot and be affected by his enthusiasm for e-learning. He's witty, he's engaging, and there are those descriptive analogies! For example, Shmikler compares the evolution of e-learning to the evolution of cinematography:

“Industry-wide, there needs to be consistency in organizing and presenting e-learning content. I liken it to the film industry in 1905 when a motion picture was made by putting a camera atop a tripod and filming a stage production. But by 1915, a universally recognized film language had developed that ultimately became the rule for all filmmakers—regardless of the language, topic, or category of a particular film. That's where e-learning is headed, and I'm thrilled to be among the people defining it.”

This historical and critical juncture is challenging e-learning's best and brightest. Is e-learning a sustainable solution for organizations, or is it the technology du jour? Shmikler says that for sustainability, a lot of assumptions about training need rethinking.

“For one, the individual craftsperson model—in which subject matter expertise resides in one or several people and drips down onto learners—is dysfunctional in the age of the Internet. That model presupposes a stability of content and needs, and that the audience can wait for completion of a program.”

JARD NEWGUARD Sam Shmikler/CEO and Action Figure/The Periscope Organization/
Beverly Hills, CA/Age: 45

Shmikler, who has garnered experience as a senior training manager at Sybase, Sun Microsystems, and the Pacific Group, knows his way around organizational culture and adult learning. That knowledge augments his super-techie, e-learning design skills. Early on, he was convinced that traditional classroom learning wasn't necessarily what his audience needed in order to perform.

“The advent of the Internet and the demand for just-in-time learning gave me a long-awaited opportunity. I wanted to design an aggressive prototype or customer-centered model for learning. The performance needs remained the same; the ultimate

continued on page 68

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investors who are funding a pilot project to develop a leadership simulation product based on immersive game technology. A Harvard professor is providing the content, a game company whose client base includes Disney and Microsoft is providing the technology, and Aldrich is building a bridge between the two camps by translating the content into the look and feel of a game.

On this path to expand e-learning's capabilities, Aldrich and his team are wrestling with two major challenges: 1) How to take professor-driven linear content and translate it into a personally meaningful computer simulation and 2) how to solve the e-learning conundrum of open-ended versus controlled content.

"I want the game to be as open-ended as possible for participants—an experience that I liken to being an ant on a basketball: no boundaries in a finite world." Aldrich points out that this is the antithesis of the traditional learning process with its set agenda of teaching X, Y, and Z.

"We want to teach many leadership principles, and we plan to create [virtual] meeting rooms in which to teach these principles. We could have one principle per meeting room, but I see a holographic solution in which each meeting room contains every principle."

The game will plunge learners into a seemingly impromptu series of interpersonal leadership challenges set in the context of the meeting rooms. The users' choices and behavior will determine the outcome of the simulation.

"There is so much there," says Aldrich. "If someone learns only 10 percent, I'm going to be pretty happy with that if the person is changed in a meaningful way. To me, that's the essential difference between sheep dipping and experiential learning."

Aldrich is realistic, however, about the challenges ahead. "A lot of people contemplate attempting what we're trying to do—after all, it's e-learning's Shangri-La. A lot of people think it can't be done. And a few are trying. But up to now, the effort is largely putting a game show veneer on information. Even the most optimistic of us don't have a clue what that transformation will ultimately look or feel like. At the very least, we're creating an interesting architecture that will live far beyond this project. But I'm confident that this is the future. I'm just not sure if it's six months away or two years away." TD

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It's easy to understand how Allen's interest in multicultural dynamics developed. She says, "I tell people I was made in China, grew up in Hong Kong, and have studied and worked in the United States, Europe, and Canada." She holds a master's degree in sociology from the University of Calgary, as well as a master's in organizational development and a Ph.D. in human and organizational systems from the Fielding Institute in Santa Barbara. The latter degrees were added about eight years ago, well after Allen had established a career in counseling and teaching. She considers those degrees the result of her own work epiphany:

"In the early 1980s, I was coordinating programs for immigrants and refugees from Vietnam, Central America, and Eastern Europe. My challenge was to help them rebuild their lives and learn how to function in a country so unfamiliar to them.

"About that time, I was introduced to ASTD and was very excited about this discovery! Up until then, I didn't know there was a source for the kinds of information and skills I needed to design training programs for my employees who would be working with diverse populations. That revelation was a turning point for me. I learned creative ways to incorporate the varied skills and talents of people from diverse backgrounds into a greater whole. That's when I became interested in organizational change."

For the next five years, Allen set up a multicultural training institute with a Canadian provincial government. In the process, she met many leaders in training and development and further honed her skills. By the late 1980s, Allen was well known for her work in diversity initiatives. In 1990, she formed the Delta Learning Organization specifically to bring transcultural and synergistic perspectives to organizations from industry to government. When she presented *The Tao of Change: The Art of Self-Mastery* at the 1999 OD Network Conference in San Diego, it was the largest-attended workshop there. "It's so exciting to share this knowledge that is transforming our world and to make it accessible and practical for organizations and individuals. This isn't work for me; it's play!" TD

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others from different cultures and who don't believe their way is the only way. We prefer people who have either lived or are from outside of North America."

Fast-forward 11 years since its inception: DNA Media now resides in a loft-like, almost ship-like space with open work areas. You pick up the phone at the reception desk and a friendly woman waves at you from behind her glass-walled office and comes out to greet you. (Everyone's much too busy to man a reception desk.) Practically the first thing you see is a metal sculpture created by DNA staff member David Botta. The piece is part of a triptych that won awards at the Osaka Biennial in 1990.

The startup has grown in many ways, but its basic work is localizing learning software and applications and developing them to be delivered in multiple languages and cultures. The company is also exploring how e-learning will evolve as a business and as a way of learning in diverse cultures and societies. Focusing on how ideas are exchanged between cultures—and what technologies and approaches are needed in order to accomplish that—Forth and his team have come to two conclusions: 1) Most of the software being developed for e-learning is designed to support only one model of learning and not the different models needed in a cross-cultural environment, and 2) the development and integration of e-learning content into multiple delivery platforms and learning styles are such big tasks that they aren't going to be accomplished by any one company alone.

DNA Media, along with such biggies as Xerox and Microsoft, are partnering on a project called GCS (globalization content standards) as part of OSCAR (Open Standards for Container Content and Reuse). GCS, if successful—Forth thinks it will be—will support standardized, cultural- and language-specific e-learning initiatives. A first iteration will be ready this year. Forth also hopes by year-end to launch DNA Recombine, a prototype of DNA Media's core technology. This technology will support a more flexible way to deliver learning and management content—"to reorganize, repurpose, and reuse it in culturally appropriate ways," says Forth.

No one has said that the new frontier of multicultural e-learning will be easy or risk-free. But Forth is certainly optimistic.

"For me, the richest and strongest ideas tend to be those that are developed at the intersection of cultures

and that are shared between cultures. In five years, I'd like to look back and see that we've helped create the knowledge and technologies that will make it possible for people to learn in a way that's appropriate to their own cultures, and that we contributed to the exchange of ideas between cultures." TD

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extent to which he or she thinks the project has met learning goals. The stakeholder is also asked to back up that estimate with examples and to assign a monetary value to the improvement. Those "reasonable evidence" figures are then used for an easy ROI calculation. Hodges feels comfortable with the figures because in comparing them with corporate-provided hard data, they're dead-on.

All evaluative information is captured and stored in a database, available on a daily basis with monthly and quarterly summaries, which can alert managers to potential problem areas. The database system saves Verizon money, time, and effort because it reduces the assessment wait time to a fraction of what it usually is. Any problems can be identified and remedied quickly.

Hodges also conducts impact studies using pre- and post-measurements and control groups to link training investments with overall corporate performance.

"We use as many of the methodologies and processes that academia can provide us and that are practical in a corporate environment. We can then design new systems ourselves."

Noting that mergers and other corporate seismic shifts create a continuing challenge to evaluation efforts, Hodges is nevertheless clear about how she wants training to be perceived at Verizon over the next five years: "I want my figures to be on that one-page report that our CEO sees every week. I want the CEO to see the extent to which training is influencing the bottom line."

Although Hodges's assistant is a talented measurement professional, having only half of an assistant's time could be frustrating. But it doesn't seem to faze Hodges. It just fans her desire to put the finishing touches on her companywide evaluation system so she can "focus on more of the strategic aspects of evaluation."

Given her skills, one can only speculate what this upcoming concentration effort might yield. TD



jones, continued

Once the decision-support tool had proved successful, the next step was to create knowledge management tools around e-learning. “We wanted our groups to understand what it means to attend a virtual classroom, to create engaging learning experiences, to know who in the company has done those things successfully, and to know where the best outside information sources are.

“One of the key results of this strategic approach is that now all 14 groups are reading from the same training page. Once we had buy-in, we could begin to implement the plan, select a learning management system, and choose a particular e-learning authoring platform.”

What Jones and his team have accomplished has generated a lot of outside interest from companies that haven’t been able to achieve such a smooth integration, even though they don’t have as many separate and distinct divisions. Jones shares his e-learning insights: “To make an e-learning venture successful, 1) determine how well the content matches your organization’s culture; 2) determine whether the content actually teaches somebody something; and 3) determine how to communicate and market it well.”

Taking the strategic path doesn’t necessarily culminate in overnight success. “An organization can’t be afraid to make some missteps along the way. I also tell people that in that first year of trial and error and implementation, the *e* in e-learning sometimes can stand for expensive. But that’s just part of the whole process.”

Jones credits his background in psychology as contributing to his present success. After earning a master’s in counseling from Columbia University, he spent two years counseling students and adults. “The work was personally satisfying, but it left my wallet very empty. I decided to take my skills and apply them to the corporate world.” In 1995, he became a training manager with Manufacturers Hanover Trust. Next, he was offered the job of technology training manager. Three mergers in a row brought him to his present position.

“My background in counseling has proved invaluable for what I do now. I’ve come to understand that e-learning requires both technology and people skills. No matter how terrific you think your e-learning program is, many people will not automat-

ically love it or use it. You have to get people motivated to use it and help them get beyond their fears about technology. I consider myself an interpreter—someone who can translate the needs of the technology department to the HR department and vice versa.”

Right now, though, Jones and his team have their hands full with merging two distinct platforms. But they’re already looking beyond that task. “In five years, one of our goals is to have an integrated learning platform, not just around e-learning, but also around instructor-led training, self-study, mentoring activities, meetings—everything so employees are able to learn when they want to and how they want to.” TD

joseph, continued

conducted during those three days on the water!”

The rest, as they say, is history. The HR manager hired Joseph to work with him on a special project for about six months. Next, Joseph spent a year in customer service and some time in the advertising and displays department. In 1994, he was introduced to the manager of Aboriginal Relations, who hired him to make cultural awareness presentations to Hydro employees as well as to groups across British Columbia and other provinces.

“A large focus of the program,” says Joseph, “is helping employees understand aboriginal peoples and their issues as they relate to BC Hydro. Aboriginal peoples are different from mainstream Canadian culture. For example, aboriginal lineage can be matriarchal or patriarchal, which influences who makes final decisions. An especially egregious faux pas is to make a presentation to a matriarchal community and focus on the male counsel members who are gathered around the table and not pay attention or respect to the elderly woman sitting back in the corner. She just happens to be the head of the community.”

BC Hydro has made a significant commitment to fostering cross-cultural relationships, and its leadership has paid off. Says Joseph, “Our reputation in this area is such that now more than 100 other Canadian organizations, including huge, multinational corporations, have come to us to adopt our model for developing aboriginal relations.”

At some point, serious profits began to be realized from the department’s outside cultural awareness workshops. “That’s when we went to BC Hydro’s

board and pointed out that the profits were being made from information supplied by aboriginal communities, our subject matter experts. We didn't think that the money should go into general revenue. We asked that, after subtracting operating costs, the profits be used to fund more cultural training initiatives and to help aboriginal groups develop the necessary skills to be able to work for BC Hydro, or one of its major contractors." The request was granted.

Amid the offices of Aboriginal Relations adorned with tribal masks and other regalia, Joseph sits at his impossibly clutter-free workspace (save for a few photos of his family) overlooking the sweeping Vancouver landscape and muses: "I feel gifted in a special way because there aren't many people who can go to work and be able to help their company, their community, and their country—as well as make a nice living doing what they love to do." TD

maddocks, continued

people were unhappy, under tremendous stress, and lacked leadership.

"Just like in the manufacturing division," says Maddocks, "I identified where there was bleeding, and I chose to fix and innovate at the same time. This isn't a one-person job. I partnered with my peers, and together we established our priorities."

In that case, the focus was the Cisco Partner Recertification process, which was uneven and lacked quality. The subsequent innovative solution goes beyond the confines of the customer training department and will no doubt firmly fix Cisco on the e-learning map within three years. Maddocks and her dream team instituted an entirely new development process in the use of learning objects, which are authored once and then delivered in many formats.

Maddocks explains: "We've taken our eight certification courses—averaging 1,000 pages each—and grouped them into learning objects and authoring tools. The result: We now have about 15,000 learning objects—40,000 information objects, counting graphics. Those are in a database—written, edited, and illustrated. We're very excited about this project because of its self-serve flexibility. People company-wide have the opportunity to take objects from the

database, rewrite them, and put them back with a different title."

Although costly to implement initially, reuse of the objects is expected to deliver a healthy ROI this year and reduce development cycle time by at least 50 percent.

"The reason our process is different," says Maddocks, "is that in most companies, the entire lesson is an object. If you want to change something, you have to take the whole lesson out and re-post it. But in our case, you can replace any small element and not have to rewrite the whole course. It truly is object-based."

So, what happened to Maddocks's dream of being a director?

"Well, training is a lot like theater, and I do feel like a director sometimes. I love it when I'm given a project, can work with a team on creating business solutions, and then have the desired results actually come out!" Of course, there's always more to aspire to.

"Right now I'm just making documentaries, but someday I'll do a *Star Wars!*" TD

margolis, continued

Collectively, the alliance organizations have trained and placed more than 600 adults from urban areas into Web-development jobs. Says Margolis, "We saw the role of CitySkills as the needed bridge to connect industry with the thousands of U.S. job training programs that are eager to prepare urban adults for high-tech jobs. Its role as a catalyst will help create a national voice and agenda for this movement."

Although CitySkills is still in the startup mode, Margolis hopes to affect the status quo. "We want to change the misperceptions that exist about who can and who can't participate in the increasingly technology-driven economy. If a training organization can bring qualified talent to the marketplace, then that completely transforms the typical relationship between a not-for-profit training organization and a potential employer."

Lest one think social responsibility is his first motivator, Margolis quickly dispels that impression. "We're talking legitimate economic value here. This isn't about corporate charity work or a handout. The graduates coming out of these programs want to be judged by the same criteria



as any other job candidate.”

Is the program right for every urban adult? “Of course not,” says Margolis. “Not everyone is ready to be a Web developer. Most alliance members have a waiting list, which enables them to make their programs competitive and a self-selective match with the right participants. But like Dorothy in the *Wizard of Oz*, these organizations are pulling back a curtain and demystifying what’s behind it. Technology isn’t rocket science, but it does have logic and rules. Once people learn the language, they’re empowered to explore what in the technology world really fits them—maybe it’s design or programming or management. Ultimately, the entire process is about acculturation—in this case, preparing urban adults to be knowledge workers for the new economy workforce.”

Margolis credits his background in cultural anthropology and comparative religion with giving him a foundation for his current thinking and approach, as did his exposure to many different cultural environments. He lived in Switzerland until he was nine years old, then moved to Los Angeles, and later to Boston. He learned early that everyone comes at life from a different perspective. That mindset serves him well as he works with organizations and people from various walks of life and backgrounds.

“Talent is a company’s most prized asset as well as its most limited commodity. When you think of what drives the new economy, it’s the people, the ideas, and the ability to process information. Developing the American workforce is a top economic priority. It brings me no greater joy than to share knowledge and bring people together. Knowledge and community are empowering. Every time you learn something new, you feel a little more at home in the world.” TD

shmikler, continued

criterion for success remained the same. But how we would get there had to be attuned to the information age.”

Shmikler asserts that a well-designed online course must capture and hold a learner’s attention. “Where we’re failing is that we haven’t yet earned the right to that attention.”

A client often brings Shmikler in as a “script or in-

teractivity doctor” for programs that are either “half-baked or half-built.” Shmikler often finds that the program was initially used in a standard classroom setting. After examining the learning elements of the classroom version—such as time spent on discussion and lecture—he assesses the online experience and the percentage of time spent in those same categories.

“Great online learning should shift the lion’s share of time away from lecture, presentation, and discussion to questioning, practicing skills, testing, and producing feedback.”

Shmikler points out that learners are more sophisticated and have developed certain expectations from their noninstructional browser experiences. If an online course isn’t well designed and well executed, learners are likely to become frustrated and “hit that little x in the right-hand corner of the screen. Poof! They’re gone.”

Shmikler admits to envying his eight-year-old son. “Like most of his generation, he has never known a nonbrowser world. He’s able to look at things with eyes that have never been encumbered by limitations of memory, screen resolution....” *Earth to Shmikler!*

Back to reality, Shmikler lets us in on a secret: “In the pre-launch phase of the last four e-learning portals designed for our clients, I brought in my son and other first- and second-graders as the pre-testers. They had no idea that the content was targeted for adults. I had them look at the sites and give me feedback on what they understood. I more or less asked them to validate our choice of icons, graphics, and navigation. We figured if we could make a program easy to understand for six- to eight-year-olds, it would work for adult learners.”

Shmikler also wants to break the mindset that a course should end at 5 p.m. “One of the benefits of Web learning is that it doesn’t have the delivery cost of traditional training. You pay once, and it doesn’t matter how many times you dip back into the content or how many learners you have.”

Unable to resist a parting analogy, Shmikler adds: “Let’s just say that one of my holy missions is to transform learning from a one-shot inoculation to an online slow-drip IV.” TD

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