

Meet the New
Chief
Learn
Offi

By Dede Bonner and Stacey Wagner

The new learning leaders have arrived, and they will not be denied. They mean business because that's what it's all about—meeting business needs—and they will change the way you think about learning and performance. They're high octane and hard-charging, and they're moving into your neighborhood—now. Meet the first generation of chief learning officers.

CLO positions are predicted to grow in number and stature in the near future. A March 2000 report by the Conference Board found that although only 6 percent of the companies surveyed had integrated learning functions, 60 percent planned to extend those programs company-wide within five years. In a recent *ASTD Learning Link* online survey, 22 percent of respondents said their organization has someone who functions as the chief learning officer.

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CLOs:
What
they know,
what
they do,
how to
become one.

These incumbents are designing their own jobs as they go along.

Six to seven years ago, only a handful of CLOs existed, says Gary Barton, founding partner of Barton Associates, an executive search firm in Houston. Now, finding a CLO is easier. Hundreds of people understand the CLO role and are qualified to fill it, estimates Barton. There's also greater demand for leaders who can provide a strategic vision for workforce development and execute it.

If content is king, intellectual capital is the emperor. Two research studies, one by ASTD in 2000, and another released in January 2002 by Watson Wyatt, demonstrate a correlation between the investments of companies in HR and training and their increased shareholder value. That's the knowledge economy talking, and business executives are listening.

In "Report on the American Workforce" (January 2001) www.bls.gov/opub/rtaw/message.htm Secretary of Labor Elaine Chao says, "Ultimately, [business leaders] will make our training programs the venture capital for the 21st-century workforce." She's saying that along with CEOs, CFOs, and COOs, chief learning officers will be among those people responsible for the development and deployment of their organizations' human capital and are already being recognized as corporate leaders for linking business needs to performance

strategies, thus enhancing individual and organizational productivity.

Becoming a CLO

So, what is the job of a chief learning officer and how do executives become one?

In Action: Leading Knowledge Management and Learning, by Jack Phillips and Dede Bonner (ASTD Press, 2000), examines best-practice studies of the earliest CLOs. Those pioneer CLOs describe their work as

- aligning or integrating diverse groups or diverse functions
- developing a culture for organizational learning, continuous learning, or knowledge management
- identifying critical areas for improvement or conducting needs analyses
- contributing or managing the capture, share, and retention of knowledge-content activities
- leveraging corporate-wide learning or knowledge development and maintaining relationships with senior managers
- conducting strategic planning and implementation
- uncovering best practices and benchmarking
- being a visionary or champion for organizational learning and knowledge management.

That list provides an umbrella description of typical CLO responsibili-

ties, but each of the 15 CLOs we interviewed for this article said that they didn't have a formal job description and that they either created the role themselves or their CLO jobs evolved over time to encompass expanding responsibilities. When asked to describe a typical work day, each CLO said there is no typical day and that's one of the things they love about their jobs. Whether they were recruited or found within their organizations, all of the CLOs we talked with agree that having diverse skills and a visionary perspective are musts.

The CLOs we interviewed have backgrounds in learning, training, education, human resources, business ownership, sales, and marketing. They come from a variety of industries and demonstrate industry-specific expertise, which is critical in helping them understand their business challenges and in designing solutions to those challenges.

For example, Chet Zoltak, CLO of Towers Perrin, earned a master's degree in industrial organizational psychology and immediately went into training and development. After traveling the world doing training for Towers Perrin, Zoltak ended up back at corporate headquarters as the head of HRD and the Towers Perrin Institute. He's now chief learning officer for one of the firm's core businesses, Towers Perrin Administration Solutions. Zoltak created the CLO role for himself by explaining to his boss the difference between being a training manager and the broader responsibilities of a CLO.

Deb Capolarello, CLO of MetLife, says her position was the result of MetLife's preparations to become a publicly held company and its need for someone to drive the company's culture-change process. When the MetLife executive group went looking for someone who could handle additional responsibilities to HR, it turned to Capolarello, who had been an HR professional throughout

her career. When she took the CLO position, she acquired a group reporting to her on organizational development. That group worked with the business units to revamp the company's performance management process. In addition, Capolarello opened up her CLO position on other fronts, working with communications on consistent key messages and creating a new learning and development function to build the skills and tools to prepare MetLife for a test of public ownership. Now all of employee relations and recruiting, as well as learning and development, are under her leadership.

Kathy Iversen, CLO of Andersen, has been in that role since June 2001, and with Andersen for more than 10 years. She was formerly a partner in the business consulting practice specializing in strategy, organization design, and behavior for Andersen's people practice. Last year, Andersen's global executive team saw the need to organize learning and knowledge-sharing activities globally, but wanted to do that "loose and tight." The team wanted to "drive commonality where it makes sense, but in a way that provides sufficiently flexible solutions that meet the cultural and unique priorities of geographies and solution areas."

David Koehn, CLO of the small consulting firm RGS Associates in Arlington, Virginia, tells how he had been the CLO at another small company when RGS found his Website and convinced him to become its CLO.

The CLOs in this article come from companies ranging in size from 70 employees to thousands in the health-care, finance, services, manufacturing, technology, consulting, and transportation sectors. They have such titles as director of learning, senior vice president of human resources and organizational development, director of education, chief learning director, and managing partner of global learning and personal growth. But their jobs have many common ele-

They understand the big picture and can envision learning's role.

ments, and they're largely responsible for the strategic direction and implementation of the learning function—whether that's creating a learning organization, effecting organizational change, developing the workforce, or building a corporate university. In all cases, their CLO positions are new, and these incumbents are designing their own jobs as they go along.

What CLOs need to know

What are the core competencies of these learning executives? Although they work in diverse industries, they consistently describe the same set of core competencies and critical skills for being a CLO.

Be business literate. All of our CLOs say it's important to understand fully their organizations' businesses and not just the learning function. Their mandate is to align learning with business operations and create strategic partnerships with senior leadership. To do that, they must have sophisticated business acumen.

Bill Kline, CLO of Delta Air Lines says, "Number 1: If you want to be strategic, you know the details of your business." Eric Kugler of Memorial Hermann Healthcare thinks the key is business savvy. "You have to have a good sense of the business and a very good sense of the return-on-investment of your population," he says.

Says Volvo's chief learning director,

Nilou Sardari, "Business focus, or understanding the business needs and what our business leaders need, is really the most important competency." To take a seat at the table definitely requires more than just a learning or HR background, according to Sardari. Says Capolarello, "Sometimes you can take a better businessperson and indoctrinate him or her into learning... and that person can learn [to be a CLO] because what he or she knows is the importance of the business."

Think strategically, not tactically. Not surprisingly, the chief learning officers we spoke with cited strategic thinking over tactical tasking as their second most important competency.

Says Zoltak, "It's not about e-learning first; it's about learning strategy first." Capolarello emphasizes that CLOs must "make sure they tie their learning strategies to their business strategy. Otherwise, they'll be the only academics and the executives will tell them that they don't need that kind of help."

Several of our CLOs say they depend on their staffs to run the tactical day-to-day side of the learning function so they can focus on learning strategies, vision, and the big picture. "There's really nothing that I dislike about my job except perhaps the day-to-day details," admits Cendant's Peter Karpiak. "I view my role as thinking

globally across the enterprise and having the execution done locally at the business-unit level. That lets the tactical side be carried out by the people closest to the business.”

As strategic players, our CLOs’ reporting relationships are either directly to the CEO or to such levels as senior VP of HR, head of the business division, or executive team. Depending on the size of the company and department, these CLOs have from one to 350 reporting staff.

Define the vision. The CLOs we interviewed are responsible for ensuring that individual and organizational learning are in alignment with business goals. They understand the big picture and can envision learning’s role in that picture. In fact, they characterize themselves as “big picture people.” Many say their first tasks as a new CLO were to articulate a vision for learning and leadership and start making the vision happen.

Illustrating that point further, Chris Skerlong, CLO of Highmark Blue Cross/Blue Shield, says, “I think the most important thing for anybody at this level is a vision of how this function supports the business in terms of knowledge and skills.”

Jeannette Harrison of Intel concurs: “I spend a great deal of my time interfacing with business leaders on issues of strategic importance throughout the corporation, as well as aligning with the manufacturing and factories in terms of what’s going on there. I could do that all day, every day. I am a big-picture person.”

These learning executives work closely with their organizations’ top executive teams and are, therefore, tuned-in to the big picture and bottom line.

Advocate passionately for learning as a business imperative. Many of our CLOs describe how they have an almost evangelical zeal for building a learning culture and organization. They

see learning as improving people performance, which leads directly to better business results. Volvo’s Sardari believes that “having passion for this work could be one of the greatest drivers.”

Being a passionate advocate seems to be partly why these CLOs enjoy their jobs. Several say they have a lot of fun and that their jobs are a good fit with their skills and interests. They certainly sound fulfilled. One could deduce that their job contentment comes from being passionate about the importance of human and intellectual capital development, at the highest organization level.

Bill Thomasson, director of learning at DynCorp, says, “I went from an HR role, in which everyone else’s problems were my problems, to having fun in this job.”

Work cross-functionally and be multiskilled. The varied backgrounds of our learning execs helped develop them as successful CLOs. Says Bill Kline, “I think having different experiences in different disciplines is helpful.” Likewise, Mike Horst, director of education for Lancaster General Hospital, says, “A CLO has to be somebody who can really work cross-functionally. Someone who can work with five or six different departments, and come up with solutions and help resolve issues in the organization.”

Colleen Thornburgh, CLO of Children’s Healthcare in Atlanta, describes her own experiences: “I was thankful I had a background that wasn’t just in training and development, but also in an organization that had an operational focus. I’d been in sales for a number of years and understood the importance of revenue streams.”

Understand technology. Most CLOs aren’t technology experts, and none of the ones we interviewed talked about the technical aspects of their jobs. But they all agree that knowing how to utilize technology is an important CLO

competency. Nick Van Dam, CLO of Deloitte Consulting, believes “technology is the corner-stone of a learning vision in most companies. The CLO needs to be learning-technology savvy to a certain level.”

Be a superb communicator, listener, and influencer. During the course of the interviews, a high percentage of the CLOs specifically mentioned the value of being a good listener. Peter Karpiak emphasizes that he’s “a problem solver. I listen to people.” Bill Kline echoes, “Interpersonal communication skills along with influence skills are absolutely critical for success as a CLO.”

Strong interpersonal skills help these CLOs build partnerships with senior management, create coalitions, and herald learning in their companies.

Our interviewees also cite these competencies:

- problem solving
- consulting
- project management and change management
- people development
- ability to delegate
- entrepreneurial perspective
- international experience
- ability to understand the difference between training and performance management
- self-awareness
- knowledge of educational initiatives such as instructional design, corporate universities, and e-learning.

In short, the role of CLO requires basic business savvy and a visionary mindset balanced by a technical understanding of the learning function.

Making it stick

We wanted to know how our CLOs would be institutionalizing their profession, so we asked what they were doing to groom their successors. Only a few had put a well-defined succession plan in place. Most of these first-generation

CLOs have been in their jobs for less than two years and are still working on establishing themselves, overcoming the training versus learning-and-performance mindset, and proving their organizational value. Jeannette Harrison says, “You really have to stick your neck out and be out there in front of people creating awareness and making it happen.”

Capolarello says, “This is a profession, but it goes back to the right person and right job. That’s the way you really institutionalize it. Some CLOs seem to be very removed from their businesses, which would lead me to believe the position won’t stick in their [organizations].” The conclusion is that CLOs who see themselves merely as glorified educators won’t be around for long.

Knowledge management is a driver for most of these CLOs, but they relate more closely to learning management. Many talk about knowledge creation and sharing as they relate to learning strategies, and the importance of using knowledge tools to leverage learning. Chris Skerlong defines the difference as she sees it: “To me, knowledge management is more about quantifying and documenting the knowledge base of the organization. The learning function is what you don’t know.”

Several CLOs say that their organizations have a separate function for knowledge management under a chief knowledge officer.

When asked to give advice to the next generation of learning executives, the CLOs highlighted these areas:

- having broad experiences
- paying attention to organizational needs
- building a business within their businesses
- knowing one’s own strengths and weaknesses.

Peter Karpiak thinks “having a broad background is probably the better thing.” Bill Kline proposes that you “trust your instincts and be broad

in your thinking.” Colleen Thornburgh says, “Take the approach that this is your business within the business, and show how it’s going to benefit the organization.”

Rebecca Ray, senior vice president of training at American Skandia, sums up much of the CLOs’ advice with her comment that “you need to be at the top of your game in terms of how adults learn and what training and development looks like. Secondly, you have to understand the business and industry you’re in so thoroughly that you can help people see the direct application of what you want to get done.”

Says Nick Van Dam, “Assess what kind of role it is and where your strengths are. Identify people who can fill in your experience and knowledge gaps, and you will be successful.”

Aspiring CLOs should take that advice and run with it. These new learning leaders are excited about moving the training and learning functions into their companies’ boardrooms. Care to take a seat at the table with them? TD

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