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atd td

Established in 1947

TD (ISSN 2374-0663 print; ISSN 2374-0671 online) is published by the Association for Talent Development (ATD) monthly plus a 13th issue in the spring. Principal office: 1640 King Street, Alexandria, VA 22314; 703.683.8100. Association members receive this publication at the annual subscription rate of US\$60 as part of their membership dues. Nonmember individual subscriptions to US addresses, \$150 per year. Foreign individual subscriptions, \$249 per year. Institutional rate to US addresses, \$331 per year. Foreign institutional rates, \$430 per year. Claims for replacement of subscription issues not received must be made within 90 days of the issue date. Back issues are available for purchase for US\$19.50 each, postpaid. Rates subject to change without notice. USPS #636800. Preferred Periodicals postage paid at Alexandria, Virginia, and additional mailing offices. POSTMASTER: Send address changes to TD, ATD Customer Care Center, 1640 King Street, Alexandria, VA 22314.

Publications Mail Agreement #40030826 Return undeliverable Canadian addresses to: P.O. Box 1051, Fort Erie, ON L2A 6C7 email: CustomerCare@td.org

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2020 Bronze EXCEL Award, Feature Article Design, "Avoid Becoming a Thing of the Past," December 2019

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2017 Silver EXCEL Award, Mobile Application (Magazine)

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2016 Gold EXCEL Award, Mobile Application (Magazine)

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2015 Bronze EXCEL Award, Mobile Application (Magazine), TD App

Winner, 2014 Ozzie Award, Best App, Association/Non-Profit, T+D App

Honorable Mention, 2014 Ozzie Award, Overall Design, Association/ Non-Profit, February 2014 issue

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editor's note



Learn How to Learn

any articles we've published over the years have noted that talent development professionals often focus more on developing others' skills and competencies, placing their own development on the back burner. Reading *TD* magazine definitely counts as part of your professional development, but what else could you be doing to further refine your skills, hone your craft, and learn to be better at the job as it's defined now and how it may be defined in the future?

The global COVID-19 pandemic has forced businesses to rethink their offerings and business strategy, which subsequently trickles down to the work that employees do. Some of your responsibilities have likely changed, as has the way that you design and deliver training and assess what your company's current and future needs are. "What the pandemic has brought to light is the importance of foresight to TD personnel," writes Cheryl Lasse in this month's cover story. It's time for you to pivot and adapt.

To do so, Lasse explains, you need to learn how to learn—not just about TD-related topics but about the business, your company's industry, and any other area that will help you do your job better and set you up for success. Take steps toward future-proofing your skill set.

In her article, Lasse offers professional development advice for both employed and unemployed TD professionals on how to capitalize on this moment. Yes, it's literally your job to help develop others' skills, but you also should view it as your obligation to focus on your own skills. We're here to help you in both regards.

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Author Guidelines:

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Printed in the United States of America

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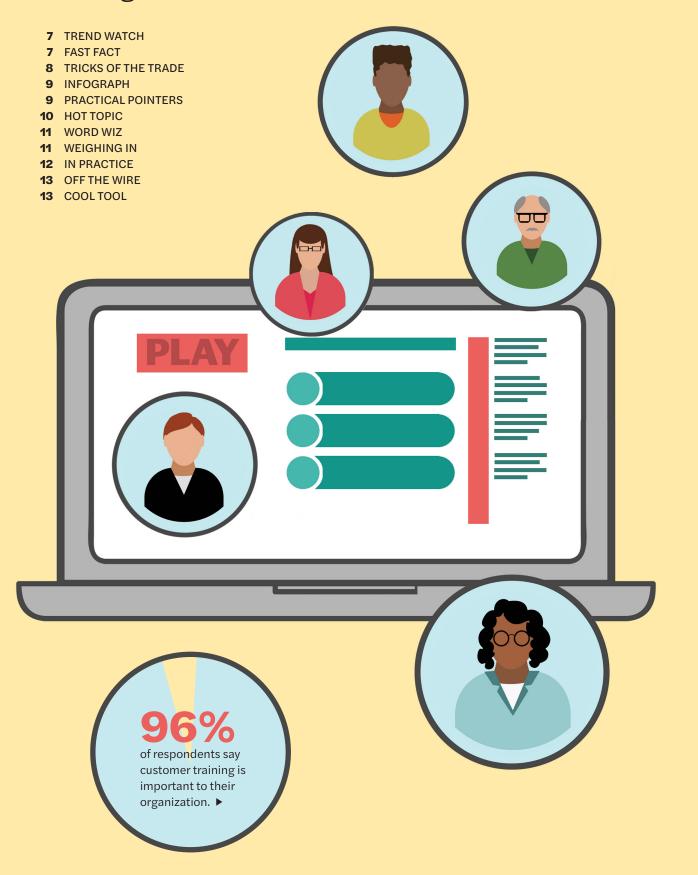


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Customer Training Drives Loyalty

Companies are turning to training to retain customers and increase brand awareness.

BY DERRICK THOMPSON

hile employee training and development is recognized as a critical factor of business success, Thought Industries' 2020 State of Customer Training: An Integral Driver to Business Success report suggests that training programs specifically targeting customers also may be a smart move for businesses' bottom lines. In the first quarter of 2020, Thought Industries surveyed more than 150 individuals from various industries and company sizes to capture a snapshot of the role customer training plays in business.

Training opportunities designed for external stakeholders are known as extended enterprise learning, and customers are key constituents among those stakeholders. Customer training opportunities can take the shape of certification programs, on-demand videos, virtual classes, or online tutorials, and they are markedly prevalent in the computer software industry.

Three-quarters of respondents shared that their company's use of customer

training has increased in the past five years. Organizations likewise see the value in it, with 96 percent of respondents noting that customer training is important to their company and 63 percent ranking it as extremely important. For certain businesses, customer training has become an integral part of product rollout strategies.

Why the emphasis on customer training? Respondents pointed to loyalty as one reason. "Well-onboarded and well-trained customers are more satisfied, 'stickier' customers that grow in value over time," the report notes.

Respondents also stated that customer training can increase brand awareness. Forty percent use certification programs; of those that offer such programs, more than half see brand awareness as an added benefit.

Despite its benefits, customer training is not without challenges. The top three are customer engagement and adoption, content management, and measuring business impact. Still, respondents are finding ways to tackle them. For exam-

ple, although 43 percent acknowledge struggling with measuring the impact, about one-third are measuring adoption rates and renewal rates.

The tools and technology needed to develop a robust customer education program are likely already in the L&D wheelhouse, with a robust learning management system central to organizations' success. Fifty-seven percent of respondents have an LMS they dedicate to customer training, which can assist in managing content, tracking learner engagement, and scheduling sessions. The increased focus on that aspect of extended enterprise learning presents new opportunities for talent development professionals, including to partner with operations in a way that positively affects the businesses' bottom lines.

Derrick Thompson is a writer/editor for ATD; dthompson@td.org.

	BONUS	APP
\Box	CONTE	NT

FAST FACT

Employees Want to Work From Home



73%

of the workforce believes companies should embrace some level of remote work.

SOURCE: THE FUTURE OF WORK PLACE: HOW WILL COVID-19 AND DATA SHAPE THE NEW WORKPLACE ECOSYSTEM?, CUSHMAN & WAKEFIELD, 2020

IMAGE | ADOBE STOCK September 2020 | TD

TRICKS OF THE TRADE

Find Your On-Camera Confidence

THE SITUATION

Lights, cameras, awkward? Face-to-face classroom instruction is the ultimate comfort zone for most talent development professionals. But for virtual training, when you're live on camera, things can sometimes feel uncomfortable, and your anxiety can skyrocket. Because picturing the audience with funny hats on doesn't quite work with online training, what tips can help you effectively deliver training on camera?

THE TRICK

Setting the atmosphere for a successful virtual training experience depends greatly on your ability to create a safe, comfortable environment that is conducive to learning. Feeling less than confident does not aid in that endeavor. In fact, your uneasiness can distract learners. Here are ways you can trade on-camera awkwardness and uneasiness for confidence and comfort.

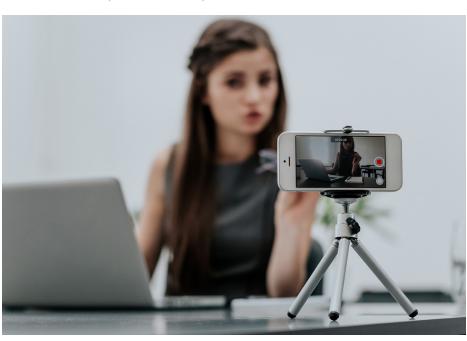
- 1. Take pride in your personal appearance. Groom or glam yourself as you would if you were presenting in person. If you would fix your hair a certain way or wear a particular outfit, do the same for your online courses. Experts say there's a direct correlation between grooming and clothing and how you think, feel, and behave.
- Complete your preparation rituals. If you'd normally practice in front of a mirror or record yourself ahead of a face-to-face learning experience, do the same for your virtual courses.
 The more you practice, the more comfortable you become.
- 3. Lead from a lectern. A standing desk or lectern to present from

- may seem like a weird prop for online training, but it can help you come across just as confident as you would in person. Often, this puts facilitators in presentation mode, which brings an element of familiarity to what may be an unfamiliar way of training.
- 4. Cap your camera time. For virtual training sessions, it's acceptable to go on camera just for introductions and break announcements as well as to conclude the session. Not only does that reduce your on-camera time, but
- it also enables learners to better focus on the presented content.
- 5. Deliver training from a distraction-free environment. Everything from a cluttered, unprofessional background to unexpected interruptions from pets and loved ones count as distractions. Knowing that you have a clutter-free background and that you're not subject to distractions will help elevate your virtual presence and enable you to devote your total concentration to the course.

PRO TIP

Poor internet or network connections can result in echoing audio, a frozen screen, and other unfavorable issues. As you can imagine, dealing with such issues in the middle of a training session can shatter even the most seasoned facilitator's confidence while decreasing the value of learners' entire experience. A reliable, fast internet connection is the bedrock of a successful virtual training experience.

SOURCE: NIKKI O'KEEFFE, SENIOR FACILITATOR, ATD EDUCATION



3 TD | September 2020 IMAGE | ADOBE STOCK

INFOGRAPH

Giving Employees a Helping Hand With Tech

How can employers better introduce new technologies?



69%

Provide more

Provide more support staff (IT)

44%





36%

Increase the amount of time to adapt to new technologies

Introduce new technologies less frequently

16%





12%

Introduce fewer technologies overall

SOURCE: OFFICE DEPOT/OFFICEMAX SURVEY OF 1,008 EMPLOYEES IN THE US, 2020

PRACTICAL POINTERS

Learn to Manage Up and Down

Help your manager and colleagues achieve organizational success.

"A person is behind every workplace goal," writes Mechelle Roberthon in "Managing Well, Both Up and Down." Because of that, everyone has a role to play in helping colleagues and the organization achieve their goals. That is where managing up and down comes into play.

As an employee, it's not about striving to make yourself look good in front of your manager. And as a supervisor, it isn't about ensuring your team likes you. Instead, managing up and down is about contributing to your organization, team, and internal and external clients.

For direct reports, you can support your manager by understanding your daily tasks and responsibilities; learning how the way you handle tasks affects your supervisor, team, and the organization; and knowing that your leader is ultimately accountable for your and the team's successes and failures. Do your part to establish trust with your manager and give honest feedback.

As a manager, you can help your direct reports with those three previously noted tasks. Help them by making time for them, showing them that you genuinely care about the team, being honest about their performance, and delegating meaningful tasks and responsibilities that will contribute to their and the organization's success.



MORE ONLINE

These tips were adapted from the September 2020 issue of *TD at Work*. Learn more at td.org/TDatWork.

HOT TOPIC

Foster a Psychologically Safe Virtual Workplace

Managers play a critical role in enabling employees to thrive while they work remotely.

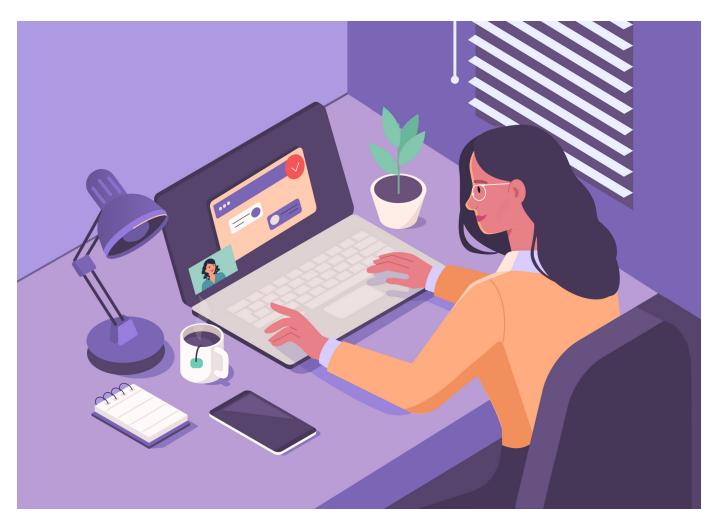
BY ELIZA BLANCHARD

arlier this year, many workforces transitioned to a new
work-from-home model to help
combat the spread of COVID-19. In many
cases, that transition took place essentially overnight, with organizations that
had never previously supported virtual
work adapting on the fly. As manag-

ers now take a step back to evaluate best practices in virtual work, they can use Advanced Workplace Institute's new research as a guide.

In 2014, AWI partnered with the Centre for Evidence Based Management to conduct research on the factors that influence productivity among knowl-

edge workers, particularly in contexts where employees were not physically together. In 2020, the two organizations updated that research in response to the increased prevalence of virtual work during the pandemic. The research found that knowledge workers require the same factors to be pro-



TD | September 2020

ductive regardless of whether they are working in an office or remotely. However, when teams are not interacting face to face, those factors are harder to maintain and require a more conscious focus.

The factors that influence knowledge workers' productivity and performance are social cohesion, trust, perceived supervisory support, information sharing, vision and goal clarity, and external communications. Teams that work apart may communicate less frequently and have fewer social interactions, which can negatively affect any of the success factors, particularly social cohesion, trust, and information sharing. Managers need to deliberately foster those elements rather than letting them develop—or fail to develop—by chance.

The research also uncovered findings that can help virtual teams perform more effectively. One key finding is that virtual workers respond well to transformational management styles in which managers ask for employees' input on decision making and outcomes. Another finding is that trust and communication form the foundation of successful teams and enable other aspects, such as information sharing and goal clarity, to flourish. Managers should focus their attention on those factors to create psychologically safe virtual workplaces where knowledge workers can thrive.

Eliza Blanchard, APTD, is a content manager for ATD; eblanchard@td.org.

WORD WIZ

Windowed Work

Remote work options, once considered a luxury, are fast becoming a necessity for today's employee. Just as teleworking offers increased flexibility of work location, windowed work extends that flexibility to the work schedule.

Windowed work is the ability to break up your workday into distinct chunks of business and personal time. According to global staffing firm Robert Half's research, nearly four in five professionals say that they work for organizations where windowed work is welcomed.

While it's clear this schedule flexibility may be of extreme value to those caring for children or elderly parents, these new findings also suggest that workers without children benefit. Seventy-eight percent of respondents with children and 66 percent of those without them say that windowed work increases productivity.

Paul McDonald, Robert Half's senior executive director, offers insight as to why: "Whether it's windowed work or alternative hours, people are happier and more productive if they have control over when—and where—they do their jobs."

WEIGHING IN



What tips do you have for strengthening employee engagement in the remote workplace?

More check-ins about how your team is doing, not details of what they're doing, and more thank-yous—neither are expensive, but the effect could be invaluable.

-Martha Kramer, New York, New York

Implement virtual variations of in-office engagement activities that existed prior to the transition to a remote workplace, such as birthday and employee-of-the-month celebrations. This continuity can assist remote workers in adapting while maintaining a sense of normalcy and community. To further build on the sense of an engaged community, assign a buddy-type system where partners are responsible for checking in on each other on a daily or weekly basis. Orchestrating this is particularly useful for bigger teams to ensure no one is left behind or feels isolated from that personal connection and interaction that is often naturally facilitated in physical office environments. Get creative with soliciting employee feedback for projects and decision making through apps like Slido and Mentimeter.

-Khadija Moore, Bridgetown, Barbados

Having informal virtual gatherings and happy hours are a great way to re-create your regular team bonding events and mimic those casual corridor chats your remote team would be missing at this time. Deliberately carving out small talk minutes into your remote meetings is essential to ensure you have a pulse on how your team is doing mentally and emotionally. I would err on the side of overcommunication—having a sense of community has never been more important.

-Nina Narayanan, Seattle, Washington

IN PRACTICE



Diversity in the C-Suite Is Needed

US and UK companies lack gender and ethnic diversity among executives.

BY DERRICK THOMPSON

rganizations across the world are quick to voice support for diversity and inclusion in the workplace. However, McKinsey & Company's *Diversity Wins*—the third in a series of D&I-focused reports—reveals that gender and ethnic diversity is still lacking in the C-suite.

Since 2014, McKinsey & Company has surveyed 365 large UK- and US-based organizations, finding only minute movement toward increased cultural and gender diversity representation in the executive suite. Organizations with women on the executive team rose from 15 percent in 2014 to 20 percent in 2019. At that rate, researchers say it will take 24 and 29 years for UK and US companies, respectively, to achieve gender parity on executive teams.

In 2017, researchers expanded their focus globally, surveying more than 1,000 large companies in 15 countries. Findings show only a single percentage point in change: from 14 percent in 2017 to 15 percent in 2019.

When it comes to ethnic diversity, researchers found similar findings on UK and US executive teams. Organizations with ethnic minorities on the executive team had just a seven-point increase from 7 percent in 2014 to 13 percent in 2019. Globally, ethnic diversity increased two points from 12 percent in 2017 to 14 percent in 2019.

According to the findings, businesses may miss out on financial gains by failing to be more inclusive. UK and US companies with female



executive-team representation exceeding 30 percent are significantly more likely to outperform those with between 10 percent and 30 percent women in the C-suite. The data further reveals that organizations with ethnically diverse executive teams outperform those lacking such representation.

In *Diversity Wins*, researchers highlight two critical barriers preventing organizations from building a truly inclusive culture: publicly committing to diversity and then not following through and not addressing inclusion bias.

The report identifies a critical step that companies seeking progress in those areas must take: Develop a systematic, business-led approach to D&I. By doing so, organizations will likely see upticks in profitability and performance. Workers who believe they are part of a fair workplace with equal opportunities are three times more likely to acknowledge they are happy with their career and continue working for the organization.

Derrick Thompson is a writer/ editor for ATD; dthompson@td.org.



1/5

of US and UK companies have women on their executive teams.

OFF THE WIRE

The HR L&D Podcast

HR and L&D professionals share the common goal of growing and developing a talented workforce. Those with an interest in both arenas will enjoy the candid and timely dialogue featured on JGA Recruitment's *The HR L&D Podcast*. Hosted by Nick Day, managing director of JGA Recruitment, which is based in the UK, this podcast brings thought leaders to the table to discuss best practices that serve to strengthen the workforce.

Since launching in 2018, episodes have ranged from "Content Curation for L&D Professionals" to "Creating High-Performing Cultures." The former features Anders Pink Founder and CEO Stephen Walsh, who discusses the key skills you need to become a successful L&D content curator. A recent episode focuses on equity, diversity, and inclusion in the workplace and features Woosh Raza, Phoenix Futures' head of HR and L&D.

According to the website, the podcast "aims to help you boost company performance by unearthing best practice techniques that will genuinely help HR and L&D professionals to align and execute learning, training and development strategies with the requirements and priorities of your company." *The HR L&D Podcast* episodes, typically posted monthly, are available for free download from various sources, including Apple Podcasts, Google Podcasts, Stitcher, and Soundcloud.

COOL TOOL

Typeform

Data collection has a long history with talent development professionals. With help from Typeform, collecting data can be a more engaging experience for you and your respondents.

The tool enables you to create forms, polls, surveys, and quizzes from any internetenabled mobile device, tablet, or laptop. The platform provides numerous templates, icons, and backgrounds from which to choose. Some of the available templates include surveys enabling respondents to rate job satisfaction, an onboarding process, and even employee engagement. Moreover, if you want to build your own survey, you'll have access to millions of images and videos that you can incorporate into data collection instruments.

As you formulate questions for forms and surveys, Typeform uses artificial intelligence to add conversational elements to the data collection experience. In final form, you can easily embed your data collection tool into webpages. You'll receive notifications when respondents complete the survey, which you can download to a spreadsheet.

Whether you use the tool to poll learners or to gather feedback on your virtual training session, Typeform is worth exploring. The free plan enables users to create up to three surveys they can disseminate however they choose. Additional plan options offer increased functionality.

IMAGE | ADOBE STOCK September 2020 | TD 13

research



Remote Work Requires Communication and Collaboration

Companies need to help employees use technology properly to effectively work together.

BY PATTY GAUL

n its third annual *State of the Digital Workplace* report, conducted in mid-February, Igloo Software asked 2,000 employees who worked remotely at least once a week about their collaboration and communication challenges. The Canadian-based technology company's findings offer insight into how organizations can be more productive and efficient in today's remote work climate.

The survey found that many employees working off-site encountered technology glitches that affect meeting participation, faced an inability to find files electronically, and missed communications about organizational matters. Eighty-five percent of workers noted they've had at least one online meeting interrupted due to technology problems. And nearly all remote employees—93 percent—have made an effort to feel more included in the organizational culture.

"As working remotely has become the new reality, it has exposed the benefits of a work-from-home situation, as well as the challenges of app fatigue, poor work/life balance and a host of data security risks," states Mike Hicks, chief marketing officer at Igloo Software.

The study raised an issue that may be more prevalent now: the lack of boundaries between professional and personal. Respondents noted that among their sources for agitation are the number of messages they receive—more specifically, those not related to work. Fifty-one percent of respondents said they were overwhelmed with nonwork messages being sent via work messaging platforms such as Slack and Microsoft Teams.

The same percentage said they have avoided knowledge sharing, that is sharing documents with colleagues, because they couldn't find the documents or it would take too long—a stat that is worsening from earlier surveys. Nearly four in 10 employees have erroneously sent a message to a colleague, anything from a love letter to sensitive company information.

Hicks says organizations now have an opportunity to revisit how individuals "connect with each other, how we have conversations, and then more importantly, how we distribute the information that results from those conversations." The resulting question, Hicks adds, is whether the company has the right tools and technology for collaborating and communicating. "A lot of times the answer is 'yes.' Where they're falling down is on the effective use of those tools," he states. Knowledge management is one of the biggest barriers to productivity, because people who need to know information are being left in the dark.

Hicks explains that spending more money on tools isn't the answer. Rather, it's about "governance and culture changes into how we interact with those tools." He sums up that the study gives employers a conversation starter as to how employees are using technology and sheds light on areas where companies can drive more efficiencies.

Patty Gaul is a senior writer/editor for ATD; pgaul@td.org.

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ORGDEV

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October 26-30, 2020 td.org/TDVirtual KNOWLEDGE MANAGEMENT

Increase Learner Retention Using Resources at Hand

Let TD serve as the center of a creative hub for learning.

BY DIANE LAW

alent development has become an even more critical organizational function during the past few years: To do their jobs well, TD professionals need to be performance consultants, thought leaders, designers, innovators, and implementers, and—most of all—they need to ensure that learning makes a difference by improving individual and organizational performance. That means employees are learning the most value-adding skills, retaining the essential knowledge to excel at their jobs, and applying their new capabilities back in the workplace. That's a big ask, particularly if you are a small department or one-person shop.

Fortunately, the new trends in TD play right into the hands of a small department. Today, learning and the creation of learning opportunities are about collaborating, focusing on where the TD function can make the most impact, and identifying actions to ensure that employees apply and retain what they've learned. Doing so can be easier for an individual or small department to implement than a large TD department, which may be less agile and have more ingrained current methods of working.

To get started, look at the resources you already have in your organization—for example, managers, colleagues, and subject matter experts—who can be of more value than paying for external courses, creating personalized learning, or trying to meet everyone's needs yourself.

I recently supported the HR department of a small engineering company in the UK that had a tight budget for formal training. The company's leaders knew they needed to offer significant professional development to hire and retain the caliber of staff required, so the TD team began examining how we could use the expertise already inhouse to create better and more targeted learning than staff could get elsewhere.

Don't get carried away by producing. Traditionally, the organization's TD staff were the sole custodians of designing or sourcing face-to-face training, e-learning, and digital resources—a time-consuming and expensive endeavor. When a manager spotted a business issue such as poor sales, a request to create a negotiation skills course would follow. That would result in a flurry of activity to create an online or face-to-face course. The training initiative would be good, but would it solve the problem?

We decided on a new approach. The first step was to reach out to everyone in the company and ask them for any resources that had helped them improve their performance. We received a wealth of videos, articles, names of people, job experiences, and so on, and cataloged them by topic, level, and type, with attribution to the contributor. Employees could view the resources at the point of need, thus ensuring their relevance and immediate use and embedding the learning into their work. We encouraged staff to annotate the resources with examples of how and when they employed them on the job and to include the results.

Benefits for Learners

Learners and managers are involved in the creation and curation of resources, with learning on the job ensuring improved retention. They spend less time on courses and more time collaborating and actively learning.

Benefits for TD

TD staff can do more with less. By using managers, subject matter experts, and collaborative communities, the TD role becomes more advisory and value-adding.

Organizational Benefits

Learning becomes more central to the organization's culture and more agile. Learning built into the flow of work improves performance.

Manager as mentor. There is nothing more relevant to improving performance and retaining learning than integrating development into the everyday work environment. That relies on every manager seeing staff development as a critical part of their role. Therefore, investing in line managers' development would have a valuemultiplier effect.

Working from the top down, managers' supervisors could become role models and lead by example. Although the company had some great examples of good managers, many supervisors considered management to be about getting the current job done. We needed to shift their focus,

SOLUTION

Asking all employees to offer development resources creates ownership and ensures content is relevant. which wasn't a quick win. But it sent signals that the organization was serious about development.

We provided guidelines and support on coaching behaviors, listening techniques, ideas for stretch assignments, and onthe-job learning to senior-level managers. That cascaded down to the people they managed.

Subject matter experts. Every successful company, big or small, has a wealth of internal experts. In the engineering firm, the TD team generally interviewed the SMEs about their specialist topic, created materials, and checked in at regular intervals to ensure the training development process was on track. We decided to shift to a more active network of ex-

perts: Rather than turning SMEs' knowledge into courses, we set up the SMEs for success by determining the right format for each of them to play to their strengths.

Peer collaboration. Communities of interest foster collaboration and cooperation, the exchange of diverse perspectives, and the creation of entirely new knowledge. At the engineering company, TD's role transitioned to one that enabled such communities to form, function effectively, and provide sustained value to their members and the organization. We created cohorts from people who were inducted together, attended courses together, were of the same level, and shared interests.

In addition to the money and time saved by not investing in another training or e-learning module, getting the entire organization involved in developmental efforts led to many benefits.

Amassing resources that had been useful to other employees created a positive atmosphere and engagement. Employees retained information as they trialed and practiced the skills on the job. It also meant the TD function saved a lot of time trying to find or create the volume of useful resources employees provided.

We knew managers can make or break employee experience. Although there was a heavy time investment at the start of the process, after we got top managers committed, they championed the change themselves. Managers began to take more responsibility, and they were measured on it. They began to coach, give feedback, support,

and look for stretch opportunities. Staff felt more motivated.

The TD staff became more of an advisor to the managers rather than doing the training ourselves. We collected examples and shared how people were learning on the job and created a monthly award. Because learning was in the real world, employees practiced skills, managers offered feedback, and thus, employees retained the knowledge and skills.

To help SMEs help us and other employees, we created templates for frequently asked questions with key topic takeaways. We hosted one SME per month at a lunch & learn, which we tagged and recorded for future reference. Some SMEs even agreed to be contacted directly with questions from staff.

After we created cohorts of staff members, the groups were self-monitoring, which saved us time. Some communities

RESULTS



The company saw a 70 percent increase in staff involvement in learning activities.

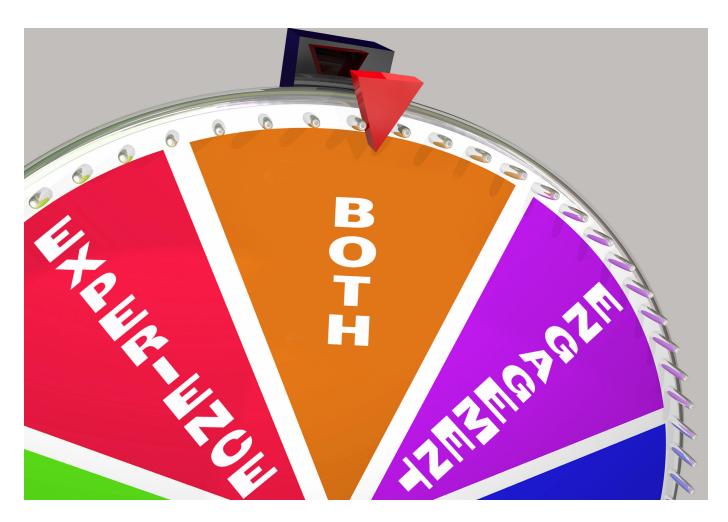
thrived, while others perished if they served no value.

Focusing on using the resources available meant shifting TD from doing to coordinating, advising, and creating momentum. Admittedly, it is an up-front time investment, particularly for one person. But involving others is reaping rewards in the longer term as the changes become embedded into the organizational culture. This necessitated a shift from creating content to curating content, from designing courses to enabling collaboration, and from conducting training needs analysis to sense-making across different contexts—and then bringing it all together.

Diane Law is director of Peppermill, working with organizations to help them shape game-changing, vibrant, collaborative learning cultures; linkedin .com/in/dianelawactivatecs.

fundamentals

ORGANIZATION DEVELOPMENT AND CULTURE



Employee Experience or Employee Engagement?

Rather than viewing it as an either-or proposition, go for both.

BY ESTHER JACKSON

e need more employee engagement!"
"No, we need a better employee experience!" Do those statements sound familiar? Is your organization focused on improving only one of those areas? If so, that is mistake number 1. The second mistake is viewing employee experience (EX) and engagement as isolated components independent of one another. It's time for those to be mistakes of the past.

With increasing focus on employee engagement, it is easy for companies to let EX fall by the wayside. The focus on engagement is understandable, however, considering Gallup research indicating that employee engagement in the US is at 33 percent, and only 50 percent of employees would recommend their workplace to others. In addition, these factors direct many organizations' attention to employee engagement: scarcity of top talent,

critical skills shortage, and the lowest unemployment in years (prior to the COVID-19 pandemic).

Even the organizations that place a significant focus on EX may overlook or even sacrifice the opportunity to improve engagement in the process. The truth is that engagement cannot start until after the experience begins. Instead of a competition or trade-off, the two should be an alliance that works to achieve what is in employees' and the organization's best interest.

Individual identities

One problem traces back to a lack of clarity on what experience and engagement are in relation to employees. EX can have many disguises, but engagement must not be one of them. Experience and engagement are two distinct players that carry heavy weight individually.

EX is the journey an employee takes with an organization, spanning the time before being hired to the interactions following the individual's exit from the company. EX encompasses all that employees may learn, do, see, and feel throughout the five phases of the employee life cycle: recruitment, onboarding, development, retention, and offboarding.

In comparison, in a July blog post, Josh Bersin, an independent analyst and founder of Bersin by Deloitte, defines employee engagement as "the measure of an employee's satisfaction with their employer and their job." EX influences employee engagement rates, but engagement rates do not completely reflect EX. Companies can view employee engagement as a reflection of certain organizational touchpoints throughout the employee life cycle.

Employers can have the best of both worlds by working to improve EX and engagement. Organizational leaders sometimes view engagement as nothing more than a program for which talent development professionals must meet program objectives within a budget and obtain employee survey responses to a temporary initiative. However, EX is a broad topic warranting greater organizational support and attention.

EX encompasses an employee's interactions with the company in onboarding, accessing benefits, training, promotion process, tuition reimbursement requests, medical leave requests, the exit interview, and numerous other touchpoints. As for engagement, it includes the employee feedback the organization requests. Employers must recognize both EX and engagement as priorities.

Consider what it takes for your organization to be successful in both areas without shortchanging either. Avoid the practices that have caused failure for many companies in the past. Poor practices in EX include disregarding or minimizing the employee's first impression (hiring stage), overlooking the importance of offboarding feedback, and failing to use feedback from exiting employees to refine the organizational culture.

For engagement, practices that have contributed to failure include neglecting to include the employee in engagement, viewing engagement

The two should be an alliance that works to achieve what is in employees' and the organization's best interest.

Make the case

The organizational benefits of EX include brand promotion, better retention, lower turnover, and better customer experience. Engagement benefits are high productivity and performance, customer referrals, profitability, and employee satisfaction.

There are other reasons organizations should take EX and engagement seriously as competitive differentiators. The way the world works has changed, as well as the type of experience employees seek in new opportunities as a result of COVID-19. That has caused factors beyond the paycheck to capture employees' attention, such as meaningful work, a positive work environment, flexibility, growth and development opportunities, and trust in leadership. Those details define the why when talent development professionals present the case for EX and engagement initiatives.

as solely HR's responsibility, and not acting on received feedback. Leveraging technology tools and social media is a must for the innovative approaches that will drive results. There are no significant generational differences for EX, but that may not be the case for employee engagement. However, that may change as baby boomers retire and Gen Zers enter the workplace.

Make the connection

Training can make the difference in an organization's approach to EX and engagement. It can be valuable to your workforce in three ways.

First, a training goal should be to ensure that participants understand the similarities and differences between EX and engagement. Also, training is beneficial for talent development professionals looking for best practices on how to develop and implement the organization's EX and engagement strategies and

methods. Further, training can help participants understand what tools, apps, and technology are available to help bolster and support EX as well as engagement. Offering such training is a means of adding to the development opportunities that enhances EX. For example, if 70 percent of employee engagement is due to the manager, develop managerial training to help boost engagement.

Conversations, feedback, and recognition are topics to include in the training program. Consider providing managers with an engagement toolkit that addresses those topics. With training, employees and management will learn what is needed to ensure EX and engagement efforts are effective, and they'll see the value of those efforts.

Analytics is another potential training topic in relation to EX and engagement. You cannot improve what you don't measure. Organizations need to get to the analytics or big data that give insights to drive EX and engagement decisions that affect retention, bottom-line results, and key business areas.

In many instances, access to engagement data is restricted to those who need to know, but the managers who really need the data often don't know because they do not receive the information or the access. Not only does training promote the information exchange and sharing but also the application of the data and analytics.

Make the call

To move forward and develop strategies to improve in the areas of engagement and EX, leadership must answer several questions. A critical starting point is to ask how the organization defines EX and engagement. With that established, determine the desired outcome for implementing initiatives designed

Comparison of Employee Engagement and Employee Experience

Employee Experience	Employee Engagement	
Connect to business outcomes.	Connect to business.	
Train everyone involved (HR, managers, etc.).	Train managers to take daily responsibility for engagement.	
Consider a dedicated employee experience platform and provide training.	Ensure managers and employees are trained on engagement.	
Establish an ongoing employee experience approach that goes beyond hire and onboarding (include life cycle surveys).	Solicit feedback throughout the year—pulse and annual surveys— that give voice to the employee.	
Develop the employee experience based on insightful data from multiple areas (HR, training, etc.).	Obtain insightful data to inform decisions.	
Apply design thinking with empathy (consider changes in today's workplace).	Communicate data to managers.	
Implement technology (Glint, Peakon, or others).	Implement technology (15Five, Google, Peakon, or others).	

to bolster EX and engagement among employees. Leadership also may want to have input on who should be involved in moving such initiatives forward.

After settling on how leadership views engagement and EX, as well as the desired outcomes of strengthening those areas and determining the key players, you can then begin to identify the gaps by comparing what the organization is doing with what is needed. As with any strategy, leadership can weigh in on what metrics are important and how the results will be measured.

Also, think ahead to what actions the company will take on the results and decide who will be responsible for carrying out those actions. Finally, identify the training and resources needed to implement any EX and engagement strategies.

With more research, the talent development function will see greater quantifiable benefits that organizations can experience. It will certainly be evident in companies' analyses of the pandemic's impact with an increasingly remote workforce and redefining today's workplace. Now more than ever, EX counts for more than what talent development professionals have imagined in the past, and engagement is one of the vehicles that can help take it to new heights for your organization.

Esther Jackson is a project manager and instructional designer with a consulting company in Troy, Michigan, and an ATD National Advisors for Chapters member; esther.jackson@innovativelg.com.

case in point

TALENT STRATEGY AND MANAGEMENT

An Onboarding Makeover to Match a Hiring Boom

A rapid increase in district managers at Securitas necessitated a program revamp, which is showing early promise.

BY LISETTE CHREENE

n the US alone, the global security company Securitas must consistently rise to the challenge of recruiting, onboarding, and providing ongoing training for more than 92,000 employees who are spread across the country. That includes nearly 600 district managers who fill a critical role of managing client relationships, teams of security officers, and often other staff for their offices.

In late 2018, the company began a transformation of its field service structure that was designed to reduce each district manager's client portfolio, en-

abling the manager to become closer to clients and employees. As such, executive leadership estimated the need to add approximately 250 district managers in an 18- to 24-month period. In addition to turnover, the number of new managers across the time period was unprecedented, leading to additional onboarding challenges.

With security being a critical industry that operates 24/7, onboarding for district managers, and comparable roles across competing organizations, has traditionally emphasized the need to quickly



Securitas Security Services USA

Industry:

Security and Investigations

Workforce Size:

92,000

HQ Location:

Parsippany, New Jersey

Founded:

1934

transition a client portfolio to the new employee while balancing onboarding requirements. In addition, Securitas is a decentralized company, so business units approached management training in a variety of ways. Some were robust and structured, while others were more modest. Given the company's focused business strategy, compact timeline, and the number of new managers to be hired or promoted into the newly created positions, a more standard onboarding and training program was necessary.

Developing an adaptable framework

The executive leaders selected a cross-functional project team of field operational managers and training experts from across the US to develop and implement a standard training program for district managers. The executives didn't specify training lengths or topics. Instead, they empowered the project team to design a unique program optimized for building effective, independent, and entrepreneurial managers. With a clear goal, the team was able to deliver a high-quality, standardized but adaptable onboarding framework with sustainability in mind.

For insights on current training approaches, Securitas used a prior survey of hundreds of regional leaders, area vice presidents, and district managers across the US to glean how they handled onboarding. The survey included questions about training resources, content, delivery, challenges, the onboarding experience, and desired outcomes. The project team found that stakeholders wanted many of the same improvements: standardization, support, and clear measurement of key performance indicators.

Through a needs analysis, the team surfaced, evaluated, and prioritized more than 100 operational, business, and client development knowledge points and skills that successful managers have. From that, the group created a structured, 12-week experiential curriculum designed to prepare newly hired or promoted district managers in the critical areas associated with managing their portfolio: client relationship management, employee management, and business and profitand-loss management.

Program details

The first six weeks are fully dedicated to training, at which point, participants receive their portfolio. The remainder of the program is a mix of completing key training while engaging in managing their business.

Part of Securitas's recent investments in developing client-focused leaders includes the innovative and collaborative Management Training and Engagement Center (M-TEC) based in Charlotte, North Carolina. When the program initially launched in April 2019, all new district managers began their journey at M-TEC for a full week to gain a deep understanding of company history, what the company does, and how it is transforming the security industry. During week five, district managers returned to M-TEC for three days for an introduction to financials and financial analysis. The training team has since made adjustments in light of travel restrictions (more on that later).

In the other weeks, the new hires gain valuable hands-on training via field experiences. That enables practical application of knowledge and skills learned while still attending virtual, live instruction on key topics. Throughout the process, the participants complete knowledge checks, demonstrate skills proficiency, and deliver presentations related to business case studies.

Each week focuses on a specific concept delivered via a blended learning approach (live instruction, online learning, and practical application), with each week building on what was learned the week prior. Because practical application is essential to skills mastery, program designers built a 360-degree field experience model critical for demonstrating proficiency. The model includes support for new district managers and other local stakeholders to guide them through more than 20 unique field experiences, allowing for a sustainable closed-loop training experience. For example, district managers in training have visited the site location and used the technology as if they were a security officer and then as if they were a manager.

District managers receive field experience objectives, assignments, and criteria to prepare for their final presentations. On-site field training leads receive a checklist of what they must cover and what participants must experience. Also, the district managers' supervisors and regional training directors receive a review list and considerations to elicit critical thinking about those experiences, such as challenge questions for discussion. That all ensures the new managers have the local support needed to be successful in completing the field experiences.

The employees' managers (called area vice presidents) are involved from day one, taking part in location selection for the new district manager's field-based experiences as well as evaluation of their capstones and case study exercises. When managers are engaged, they have a much higher stake in the process.

For the immersive sessions, new managers get exposure to all the company's technologies, experience centers where touch screen monitors and other

equipment enhance the training experience, and the finer points of delivering presentations using a variety of mediums. In addition, field employees, subject matter experts, and stakeholders attend and participate in sessions virtually as guests and to audit the program.

Results and adjustments

To ensure the program's quality, the talent development team wanted a robust, field-based feedback model. Touchpoints and surveys are scheduled after weeks one and five, upon completion, and one year post-program. The instruments include questions related to the delivered content; the activities participants liked most and least; and what they would add, change, or keep. For surveys one year after program completion, the participants' focus is on looking back and incorporating their managers' feedback.

Although the program is quite new, it is showing significant results. Key program metrics include client retention, net operating result, and employee turnover. On average, individuals who have completed the training program are making a greater impact on net operating revenue with less time in the position compared to managers with a full year of profit-and-loss responsibility. Conservative estimates also show that turnover for individuals completing the program is approximately 10 percent less than those who have not gone through it. And to date, more than 250 new district managers have successfully completed the rigorous program, and feedback has been overwhelmingly positive.

The project team has been successful in using feedback to evolve the program. One of the biggest impacts involved the use of SMEs across the country as guest presenters and to evaluate student case study presentations during the immersive sessions in the M-TEC. The real-life experience the guests share, specific business problem solving, and their ability to engage students critically has surpassed expectations. Further, the feedback has contributed to adding depth of content in places, creating additional courses, and making modifications to learning modality where appropriate.

The onboarding program has evolved since the company implemented the first pilot using a tiered approach in April 2019. New courses, refinements, and program expansions have kept it relevant and in lockstep with operational and business needs. And in late February, when it became evident that COVID-19 would have broad impacts on the program, the team of corporate trainers shifted how it delivered the in-person content and adjusted activities to maintain engagement via a virtual learning modality.

The training team also has amended other details to consider participant time zones, in-class activities, and the teamwork and presentations during weeks one and five. In addition, the trainers identified content pieces that participants could complete as prework, self-study, or homework to minimize total time on a virtual training session while allowing for maximum engagement. All guest speakers now participate in the training virtually.

Other modifications include preceding the training with a virtual meet and greet for newly hired or promoted district

managers, which enables M-TEC trainers to review key virtual practices for the upcoming week, including a quick system test to avoid any tech delays on the first day of facilitation. Sessions held in weeks two through four and six through 12 remain generally unaffected because they already took place virtually with SMEs or followed the field experiences rubric locally. The trainers will ensure the program continues to improve and evolve, as needed.

The onboarding program's initial success has formed an exceptionally promising basis for future training plans. With a solid framework using cross-functional teams to build role-based training, it has an ability to easily expand national onboarding. With requests from the field to form onboarding programs for additional key roles, such as area vice president and area HR manager, the impact of this program has been far reaching. Its future will also include a study on return on investment and a year-in-review evaluation.

Building a management training program focused on core operational and client development skills resulted in a network of managers with shared and consistent knowledge and experiences. This enables Securitas to move faster as a company and increases the ability to support clients. With the company's strategic support in knowledge investments, the talent development team can continue to focus on a key goal: Building future leaders today.

Lisette Chreene is vice president of talent development for Securitas North America; lisette.valdes@securitasinc.com.

The onboarding program's initial success has formed an exceptionally promising basis for future training plans.

September 2020 | TD 23



t's funny how it happens sometimes. Over time, you may have thought about going out on your own but haven't taken serious steps in that direction. Then you lose your job. At that point, you decide to open your own consultancy. It turns out the setback was the push you needed to take the leap. That's what happened to me.

I was working for a company that went bankrupt overnight during the dot-com bubble crash. I'd wanted to start my own business for some time, so a colleague from the now-defunct company and I both decided that the time had come. I'm not sure how long it would have taken me to get to that point if that unfortunate situation hadn't occurred.

Others I know have similar stories. Some are laid off, then take up a hobby—such as baking or writing that turns into a new business. Some find new jobs in different industries that lead to greater job satisfaction than they had previously.

With all that's going on right now resulting from the coronavirus pandemic, this is one of those times. Note, however, that the world was already pushing employees hard for workforce changes before the pandemic. For example, McKinsey & Company predicted in 2017 that 14 percent of the global workforce will have to switch occupations or acquire new skills by 2030 as a result of automation and artificial intelligence. And according to the World Economic Forum's Future of Jobs Report 2018, by 2022, the core skills required to perform most roles will change by about 42 percent, requiring 101 days of upskilling.

The coronavirus pandemic has hastened this need for change. Who does what tasks, where, and when have been forced to change overnight. While many people are inclined to see all that as a bad thing, let's look at how to pivot for good.

How talent development is affected

If you're in a talent development or HR role, beyond the new policies and protections your team must create, you likely also need to define changing employee roles. Who can work remotely and who cannot? Who will be furloughed or laid off? And given changes in staffing levels, how do you reassign responsibilities to remaining staff? Given a reduction in force, perhaps your role is changing or going away.

Even though firms like McKinsey show that businesses can't afford to suspend capability building and despite research showing that all the companies that came out of previous recessions the strongest continued to invest in people during that time, some organizations have put TD on hold. I hope you don't work for one of those firms. But if you do, then leverage the research to help convince leadership to change their perspective on the importance of investing in their people.

To develop learning agility, you must first commit to it and make development a habit.

If you're lucky enough to be working in an organization that understands the critical importance of TD right now, there are still many things that have changed:

- Anyone involved in classroom delivery—including in-house or outsourced facilitators, coordinators, material production, or facility management—will have to find a new way to add value.
- Those involved in managing learning programs for which classroom or other live events were a large part will have to quickly find a replacement method of providing skill building.
- If you haven't been an advocate of self-directed learning in the flow of work (informal learning), you need to change your mindset and get up to speed, because that is likely to be an increasing share of your offerings.

In fact, what the pandemic has brought to light is the importance of foresight to TD personnel. Many of the changes that TD departments need to make now are changes that they could and should have anticipated. But often we get stuck in our old ways, and if it's not broken, we don't fix it. We see others using new methods, but we choose not to implement them. Or our leaders don't support the changes we suggest they need to make. They think if employees are not in a classroom, they're not learning.

No one knows what the environment has in store, but with foresight, you can be ready. How do you obtain foresight? With learning agility.

The importance of learning agility in a changing environment

Sometimes in TD, we put all our energy into developing others' skills, but we forget to focus on ourselves. I have a colleague who said her team was committed in 2019 to developing new L&D skills to take advantage of new strategies and techniques but then "never had the time" to do so. And now, they are scrambling to adapt to the new normal.

With the speed of change, the most important skill workers can develop is learning agility—the ability to learn how to learn. It is the secret to success in any role.

Learning agility enables you to constantly develop, challenge the status quo, and deal with increasingly complex problems. As volatility, uncertainty, complexity, and ambiguity permeate the environment, the ability to learn how to learn ensures that you can discard outdated ideas and skills and quickly learn new ones that are more relevant. It provides flexibility and adaptability to change.

Peter Drucker said, "We now accept the fact that learning is a lifelong process of keeping abreast of change. And the most pressing task is to teach people how to learn."

As you begin your quest for foresight, don't restrict your learning to TD. Use this time to become customer focused. Learn about your organization's industry, customers, technologies, and solutions. What knowledge or skills will they need in the future so you can anticipate and recommend them? What new issues or legislation may affect them? For example:

- When new privacy regulations, such as General Data Protection Regulation, are on the horizon, how will they affect your industry, your services, and the way you go to market?
- If the industry is adopting new tools or technologies, what are they? How can you be ready for them?
- If you sell to the life sciences industry and the federal Food and Drug Administration is plan-

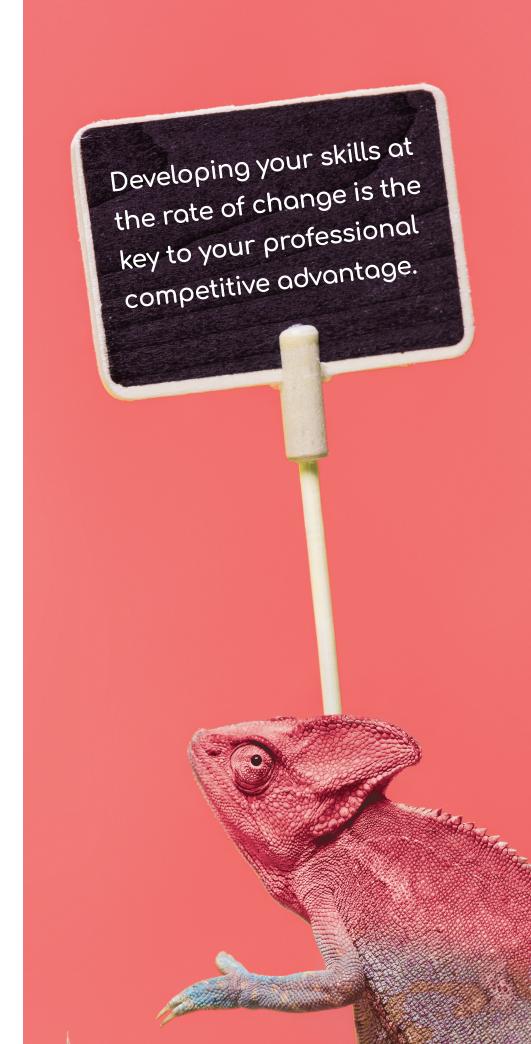
- ning new regulations about product testing, how will that affect your customers?
- If your organization sells household products, how is the Internet of Things going to affect product features and market expectations?

To develop learning agility, you must first commit to it and make development a habit. It may seem strange to think that TD professionals find it difficult to make that commitment, but it's common. Many are willing to drive others' development but won't invest in their own development. However, if you commit to your own learning agility, you'll find it far easier to drive that commitment in the organization. It's like a magic switch that helps you motivate others to embrace a culture of learning. But it starts from within.

Your development habit may be reading the latest industry blog posts and newsletters for one hour per week. And once a month, you take advantage of a skill practice, which is when you follow steps to apply new knowledge to what you do on the job. A skill practice is how you teach yourself the abilities you need and apply them to something real, learn lessons, and then apply it again.

There's a great quote from *The Expertise Economy* that says, "Developing your employees' skills at a rate equivalent to the rate of changes is the key to a sustainable competitive advantage. We need people who have the latest skills and who build new ones quickly." That's learning agility. And developing your skills at the rate of change is the key to your professional competitive advantage.

A development habit is like a learning treadmill; you don't have to run to maintain your skills—you just have to walk at a steady pace to keep moving forward. But if you stop, you'll fall off.



Skills to Develop That Prepare You for Any Role

Beyond learning agility, other skills of the future—such as critical thinking, creativity, flexibility, problem solving, and emotional intelligence—are increasing in importance. Those soft skills are valuable because they will outlast technical developments, and automation, digitization, and artificial intelligence can't replace them.

Soft skills are the differentiator between the person who can do the job and the person who can do the job with a level of excellence that ensures both their personal success and their ability to contribute to an employer's mission. You can't learn those skills from e-learning or a video alone. They require doing—skill practice on the job. For some guidance on creating opportunities for you to transfer learning, check out the ATD webcast titled How to Convert Existing Content into Competency-Based Experiential Learning.

And because where people work is changing, ensure you have digital fluency, including proficiency in key technologies you need to be productive and collaborate with others anywhere. That includes videoconferencing technology, application and content-sharing tools (Office 365, Google applications), virtual team tools (Trello, Slack), instant message applications and protocols for lationship management, enterprise resource planning).



Steps to pivot if you're working

Beyond building your learning agility, you can make a pivot for good by examining the stretch assignments you've been forced to take on. List the new skills you're using or developing. For example:

- · Redesigning jobs
- Converting classroom training to the virtual classroom
- · Converting static content to experiential learning
- Learning curation to fill content gaps

Are those activities you enjoy? Would you prefer to keep doing them after the pandemic ends? How can you shape your current role to include those activities or make a career move to a different role? If it's a career change you want to pursue, take advantage of a competency assessment to identify whether you have the other skills needed for that role, and if not, take steps to start closing those skills gaps.

As you develop learning agility and foresight, what ideas and trends should your company embrace to position it for future success? For example, if you recognize that you need to develop data analysis skills and systems thinking because they are skills of the future, why wouldn't others in the organization also need those skills? Where could agile methodologies make an impact?

If leaders agree, how can you support those efforts? What business case could you prepare to convince them? If you don't know how to build a business case, here's a perfect opportunity to learn.

Let's say you realize that systems thinking may help people learn how to solve business problems in a new way by looking upstream and downstream for better alternatives. You identify some resources for learning systems thinking and outline experiential learning where employees could apply it on the job. You document the cost of those resources and the hours required (and associated dollars based on hourly rate) to prepare and market the content. That's your solution cost. Consider an estimate of \$10,000.

Now you need to find the situation that needs improving. Find a process problem resulting from departments not working well together that systems thinking can solve. Manufacturing is an easy place to look because design, production, supply chain, and service don't always coordinate. For example, a product takes eight hours to service because the product design makes disassembly difficult. If it weren't so difficult, it would require only two hours to service. You learn that employees perform the service 60 times each month at the hourly rate of \$50 per hour.

Plug in those numbers for your business case. The current state is the current cost of performing the service annually. The future state is what it would cost if the problem were solved. Subtract the future state and the solution cost from the current state, and you get the value of your solution (see figure).

That example is simplistic, and it doesn't take into consideration any redesign costs, but it's a good example of the power of systems thinking. If you go to a leader and say, "I'd like to spend \$10,000 on a program that could save \$206,000 annually—and that's just one place I know about because the program can reduce costs across the business," what do you think the leader will say?

Steps to pivot if you're not working

If you're currently unemployed, you need to put yourself in a position to be ready for the next opportunity—not just any job but the right job. Maybe that includes going out on your own. Take time to examine new ways work gets done, and be ready with skills needed when the recovery begins.

Use competency models and assessments to examine your existing capabilities. What new or changed roles align with your strengths? That is where the foresight mentioned earlier is so important.

Ask yourself, "Where can I find my greatest contribution?" That is, rather than focus on your passion, focus on where you can add the most value given the changing environment. That's where you may find that going off on your own is the best solution.

Make a list of potential role fits, even if they include a job that doesn't exist. Who says you can't create your own? For each job:

- Identify which of your relevant strengths you can promote and leverage.
- · Identify what skills gaps you need to close.
- Create a 30-second elevator pitch that explains why you want that job and why you would be a good fit.

Calculating the Value of a Training Solution		
Current State	8 hours x 60 x \$50 x 12 months = \$288,000	
Future State	2 hours x 60 x \$50 x 12 months = \$72,000	
Solution Cost	\$10,000	
Value	\$288,000 - \$72,000 - \$10,000 = \$206,000 savings	

If you can't do those things easily, you have work to do. Next, for the top three to five roles you seek, build an action plan that includes:

- What materials or stories you're going to prepare that demonstrate your relevant strengths
- The specific activities you will pursue to close your skills gaps and a timeline for executing them (the activities must be experiential and should result in artifacts that prove you've learned the skills)
- How you will demonstrate your foresight in interviews (about your role and the organization), such as actionable steps to help the company pivot

If you walk into a job interview with the ability to demonstrate your capabilities, learning agility, and vision for how you'll help the company, you will differentiate yourself and give yourself the best chance for the role you want.

The moment is now

Regardless of your employment situation, you can capitalize on these unique times. Everything about work is changing: what, how, and where it is done. But if you use this as an opportunity to align your capabilities—where you can add the most value and what you enjoy—then you can use the pandemic to pivot for good.

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If you're working in a toxic environment, determine whether it's time to go and how to leave that negativity behind.

BY AMANDA CARROTHERS



toxic work environment. By definition, a toxic work environment is unhealthy and damaging to those who work there.

Let's explore

An unhealthy or toxic workplace is one where people are allowed to exhibit behaviors that contradict the organization's value proposition. They go against the success of the company and its customers. The culture turns negative, and the organization starts to experience high turnover and diminishing returns.

Eventually, employees stop giving their best discretionary effort and stop working so hard because they believe what they are doing doesn't matter. The impact of just a few toxic individuals can be incredibly costly.

Leaders can play a part too. Managers who are ill-equipped to have difficult conversations around performance improvement or cultural innovation can lead to disengagement, increased frustration, and overall resentment toward the company's leaders. It only takes one—an individual leader, manager, or employee.

The toxic tide can quickly turn as an upset employee tells his colleagues about his experience. They begin to collude on beliefs that work against their managers, processes, or the organization and grow stronger as a group. If leaders avoid or dismiss the behaviors, that can invite other people into the conversation, tainting their perspective of the company and making it even harder to clean up.

A story about toxicity

I remember such an environment starting to take place at a company I worked with a few years ago. A group of IT professionals who had been with the company for more 20 years began feeling sidelined and like order takers. The CEO reduced their budget, and they were passed over as the group to lead a project. Having been long-term stakeholders within the organization, the IT professionals felt confused, disrespected, and as if their competence was being questioned, though not directly.

A negative attitude, side conversations, and downright verbal dissent grew. Every time the individual team members would work somewhere else in the company, they gossiped and ranted about feeling sidelined and shared their disapproval of the CEO. The gossip started to spread, and within a few months, the entire company knew it was the IT team versus the CEO.

The bottom line is the minute the IT team was passed over to lead the project and the IT team manager didn't support his team, trust was broken.

Fractured communication ensued, team safety and security were violated, and a long-standing team suddenly felt unseen, unheard, and unaccounted for. So where was the tipping point?

The CEO had a history of being unpredictable in conversations. He could be verbally hostile (toxic behavior) at times and become overly demanding, which the IT team lead had experienced time and time again. That past history and the desire to avoid a potentially negative interaction stopped the team lead from having a direct conversation with the CEO to obtain the information his team genuinely wanted and needed.

That story illustrates how past experiences build on themselves and can set off an unintended set of reactions.

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Feeling safe

For many workers, while the hours spent in a typical office environment may have changed, work is still often our second home. Outside of family, a partner, or spouse, the majority of your waking hours are likely spent with your co-workers or in a work environment—whether virtual or not.

As demonstrated in the prior example, when the environment, culture, or even one person in an organization becomes toxic, the effects can be far-reaching and the situation critical.

With all that is going on in the world, the last thing you want or need is to experience anything else unhealthy or damaging. For organizations and people to thrive, there must be psychological safety in the workplace.

Psychological safety is defined as being able to show and employ one's self without fear of negative consequences of self-image, status, or career. 34 TD | September 2020

If you're curious about whether your current environment is psychologically safe, ask yourself these questions:

- · Is diversity respected and personal risktaking encouraged?
- · Can my colleagues and I make mistakes without fear of negative consequences?
- · Are we generally self-expressed and made to feel comfortable being ourselves?
- · Can my colleagues or I have tough conversations in a constructive and open manner?
- Is it easy to ask other team members for help and get support when I need it?
- Do I feel confident that no one in the company or on my team would act in a way that deliberately undermines my efforts?

The more times you answer yes, the greater the level of psychological safety on your team or in your organization, which consequently means there's less chance you're in a toxic work environment.

When psychological safety is high, toxic behavior has less room to grow, leaving innovation and creative problem solving to bloom. Diversity is respected, personal risk-taking becomes encouraged, and employees aren't worried about experiencing any form of retribution, all of which bring more discretionary effort to the company. It becomes a win-win because it's what employees genuinely want to experience and what brings out the best in an organization.

It's important to understand both sides of the coin, because unfortunately bullying and toxic behavior aren't things you can put behind you once you become an adult. And workplace bullies don't check one box or come with an easily identifiable label. In fact, the Workplace Bullying Institute found that 61 percent of workplace bullies are supervisors. That leaves about one-third of bullies who are not managers—the bullying and toxic behaviors come from peers or other levels of the org chart. Toxic behaviors and bullying can vary but may look like:

- Aggressive communication—someone often yells, screams, writes angry emails, or displays other forms of verbal hostility.
- · Constant criticism—a manager or leader chastises you for mistakes rather than offering constructive feedback; your successes may go unnoticed or be swept under the rug.
- Passive aggressiveness—just when you think you may get praise, there will be an attempt to take you down a notch with a comment such as "Wow, you're early for once. That's great."
- Behind-the-scenes meddling—this is where gossip, manipulation, or disparaging com-

ments behind your back come in, though to your face this co-worker or manager appears to be your friend.

If you feel like you're experiencing toxic behavior or workplace bullying, limit how much interaction you have with the bully or toxic person, do your best to maintain a neutral level of professionalism, and document everythingincluding your successes and contributions to the organization.

You'll eventually have to evaluate whether you want to remain in an environment that is toxic and negatively affecting your mental and physical health.

Do you stay or go?

If you believe you are in an unhealthy work environment, the reality is that no matter how many good days you have in the next three weeks or months, at some point, you'll have to decide on next steps and build the mental toughness to stay or go. To help evaluate your options, consider the following questions.

How is this affecting you personally? Are your mental and physical health taking a toll? Are you experiencing sleepless nights, abusing caffeine or alcohol, or simply feeling burned out and unmotivated?

Are the leaders listening? Whether or not your manager is the offender, take a look around the organization as a whole and within your work unit. What kind of behavior is tolerated? Is leadership attempting to model positive behavior and correct poor behavior?

Does the company welcome action? What is the HR reporting structure? Can you talk without fear of consequences? Are there programs in place to support employees who have been through similar experiences? Have leaders been transparent about what's happening in the culture and taking action to resolve it? What initiatives has the company put in place to support positive behaviors?

As you start to gain clarity on the full picture and make your decision to stay or leave, ask yourself one last question: How long has this overall problem not changed? If you find yourself unable to make a clear decision, set a boundary and timeline for yourself—a strict end date—to reevaluate.

Unload the negative baggage

If you decide to go, the one thing that no one tells you is once you quit a job—especially one that was toxic—it's still not fully over. An experience like that can shake you, strip your confidence, cause

you to second-guess your every move, and even cause you to experience low levels of trauma.

So, what do you do to get your mojo back and make sure you don't bring your past experience and extra baggage to a new role or employer?

First, create a clearing and a clean ending. Although you've physically left the environment and separated yourself from the culture, you may be surprised how much the experience affected you and how many unprocessed emotions are hanging around.

That is why I recommend to all my clients to start writing in a journal. Unprocessed emotion gets stuck in your body, and those emotions—some of which you can't control or even feel—may cause unintended reactions and send your body into fight-or-flight mode.

I find that those who have experienced toxic behavior or bullying in the workplace need time to process, gain clarity on what they are feeling, and come to terms with what they've gone through.

Try 10 minutes of free writing every morning for seven days. Free writing is a process in which you simply find a blank slate, a journal page, a Word document, or the notes app on your phone and write without stopping for 10 minutes. The goal is not to judge yourself or censor your writing in any way; keep the pen or cursor moving. If you commit to the exercise for a week's time, it will reveal unexpected things.

Next, develop a new vision. After you've done some emotional processing, it's time to get clear on what you want your future to look like. Try this speed visioning exercise, which is especially helpful when you are evaluating a new work opportunity:

- Make two columns. Column A will be where you list all the things you'll never tolerate again, and column B is for a highly specific list (be as detailed as possible, even if you think it could never happen) of anything you know you want in your next work environment.
- 2. Set a timer for seven minutes and write whatever comes to mind. Don't hold back or try to make the columns equal, just write. Include what your ideal day looks like, how you feel, what activities you love doing, what kind of people and communication you want to be enjoying—every detail.
- 3. After your seven minutes are up, go back through your lists and circle the things that are most important to you. Use that to weigh any future opportunity that comes your way.

Connection and coaching

Whether you're in a toxic organization or one with a strong dedication to trust, leadership, and people development, an outside perspective is critical for your growth and development. Consider forming what I call a BrainTrust, which is a small, tight-knit group of diverse individuals whom you can call on for mentorship, development conversations, or feedback.

Ideally, these individuals are from different industries, have different levels of work experience, and encompass various ages, backgrounds, and ethnicities. However, don't let trying to get all the pieces for your group just right stop you from asking people you know, like, and trust to help mentor you from time to time. You can call on your Brain-Trust for laser coaching or advice in turbulent times, and having one can help you feel connected to a larger professional circle.

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The world is a mucky place right now with so many age-old systems dying before our eyes. This is a perfect time both personally and professionally to up-level your life and make new rules for how you want to move forward. If you've determined you're in a toxic work environment, then it's time to decide what you are willing to live with. Remember, taking care of yourself first is the most important thing you can do so you can be an example and a role model for others.

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Instructional designers must be mindful of the observable and indiscernible cultural factors that influence how learners may react to training.

What Lies

"No. This is not good. You need to do a better job."

It was the end of a workshop in New Delhi, India. The focus of the day was building manager skill sets in providing feedback to direct reports. The training team carefully started the day with the WIIFM (what's in it for me?), identified and co-crafted the elements of effective feedback, and now it was time to practice giving it with a series of role-playing exercises. And despite the agreement in the room that feedback is direct, specific, timely, and focuses on the behavior, I heard almost every manager give feedback that was—to my ears—laser focused on the person in a way that made me cringe.

The participants circled their smile sheets and then left. I went back to my hotel room with a headache. What did I so colossally miss when designing that session?

Let's face facts: Business is a global endeavor, and thus so too is training. According to the Bureau of Economic Analysis, multinational organizations employed some 42.5 million people in 2016. In the US alone, American parent companies account for more than 22 percent of the private industry workforce. And even if you are not employed by one of the multinationals, you will have people entering a training room bringing with them their own unique, culturally shaped perspectives. How are you accounting for that as you design your sessions?

When I think back upon that session in New Delhi, I wonder how much of the breakdown was due to my cultural lens coming into conflict with participants' cultural lenses. Let me explain.

Check your cultural assumptions

Culture has been described as an iceberg. Observable elements such as dress, festivals, arts, and religious customs bob above the waterline. They are the sensory parts of a culture that people can see, hear, and feel. However, a sizable number of cultural elements—the sense of modesty, gender roles, and how decisions get made and who gets to make them, to name but a few—are below the waterline. People only will learn about those parts of the iceberg if they bump into them unwittingly or, better, go diving below the water's surface for them.

In the case of my feedback session, my US-centered cultural norms on what constitutes direct speech dif-

fered from the participants' practiced delivery of it because I did not consider the element of social status and hierarchy that another culture may evidence. Leadership communication to direct reports in some parts of the world may come off as harsh to my ears but appropriate in that workplace or social structure. What I may hear as severe and off-putting, the Delhi managers hear as helpful and appropriate—even as we both define it as direct.

How does that awareness change the session's instructional design? For one thing, it can help the designer define or clarify the business objectives. That session's desired outcome was for the implementing program partners to increase instances of specific feedback so that the person receiving that communication could implement the feedback quickly and efficiently.

Perhaps if I had taken the time to better understand the power dynamics of communication in that business culture, I would have designed the session around defining what *specific* sounds like within the hierarchy. I also would have realized that as someone coming into a culture with a Colonial past—one that has seen a lot of well-meaning outside organizations come and go—it was not my business to change the hierarchy and power structure of those partner organizations in India. However, it was my business to equip the managers with skill sets so that they could give feedback to drive up efficiency in the programming the organizations were co-collaborating upon.

Defining <code>specific</code>—the <code>what</code>—would have become the most important factor to the business. I may have needed to let the <code>how</code> of feedback delivery lie within that power construct.

When checking those assumptions that I come with, I would also have designed with a greater eye toward scaffolding. For instance, if the how of feedback delivery were a defined business outcome—for example, a multinational organization that wants staff experience to be consistent across all geographies—then scaffolding would have become my friend. While my headache-inducing session in New Delhi included co-creating the elements of effective feedback, I modeled how its delivery style would be within US communication norms.

If it were in fact important to the business that leaders exhibit those norms when giving feedback no matter where in the world they are, the training team would have needed to spend some instructional time and space on further definition and practice. The team would have done well to stretch that out and used spaced practice and repetition to embed the behavior.

A greater awareness of the cultural iceberg below the waterline has had me constantly challenging my own assumptions when I start on instructional design. For example, in the US workplace, almost everyone feels empowered to speak during a training workshop. That is a broad assertion to be sure (which I will address later), but in general few US workers feel like they cannot express an opinion or learning or share an idea within the workplace—particularly when it is asked of them.

When I originally designed a session to be given in Japan, I assumed that everyone can and would likely contribute. However, the reality is that in other cultures great deference is given to age or rank. The impact: In a development session on crafting strategic partnership plans, given the hierarchy in the room, junior leaders did not speak up with their ideas. It wasn't their place to do so, and if cajoled, they resisted. Rather than go with the original plan to hold a roundtable-guided discussion-based workshop, I changed the session to a cooperative game. Allowing participants to take on new or unique roles and requiring team cooperation to win meant that all voices could be heard in a way that drove the desired business outcome (identify and implement the components of a realistic partnership plan) and was authentic to the culture in which it was done.

Another example of age and deference in instructional design has played out in the creation of a train-the-trainer series. I consult with a nonprofit that, instead of employing the field office staff to conduct handwashing or child-rearing sessions in West Africa, trained village elders and leaders in effective facilitation skill

sets. Within that cultural context, deference to age and rank results in a more effective adoption of new behaviors because it has come from a trusted person.

The practice of identifying advocates and then growing their skill sets also has translated to train-the-trainer work I have done with immigrant communities within the US and technical communities around the world. That has resulted in greater partnerships with those advocates to better understand the cultural lenses brought to the design and co-creating sessions while also respecting the cultural contexts in which they are being implemented. It's not just about session delivery, which is, of course, important; it is about designing sessions to be culturally resonant.

Modifications and substitutions

You can and should modify instructional design to fit within a cultural context but also do so in a way that is instructionally sound. In addition to the train-the-trainer model, the West African nonprofit has designed its behavior-changing modules to encompass songs and skits that local arts troupes perform. That way, villagers experience the training several times and in a variety of formats that is culturally appropriate.





THE TRUTH ABOUT AN ICEBREAKER

Working with managers in India, I conducted an icebreaker at the beginning of the session that tasked each person in the room to write one truth and one lie about themselves on a notecard. The activity's objective was to determine how well participants knew each other, separating fact from fiction as I read each card.

But when I read the cards, I quickly realized that both statements on each were true. That was pretty consistent throughout the cards; most every manager put down two true statements rather than one true and one false

I was stumped. Were my instructions not clear? Was there a language or accent barrier? When I tried it with

a different group of managers on a different day, a similar pattern emerged. What happened?

To this day, I am still not 100 percent sure, but in looking back, there were a couple of factors that I should have considered before I decided to use that particular icebreaker.

Hierarchy plays a strong role in Indian organizations, as does respectful compliance. Though these managers were not part of my company, it did provide funding to them—and in some cases, influenced hiring decisions. How does that power dynamic affect frontline managers' ability to participate?

personal details, while others find it intrusive and abhorrent. Swap out those types of activities-most frequently seen in icebreakers or role playing-with activities or scenarios that are less personal.

Dive below the waterline

How do you even get started? First, cultivate a sense of humility. Unpack your own assumptions and determine why you cling to certain learning activities. Cultivate a sense of curiosity about yourself and your participants. Hold tightly to the session's learning objectives but hold loosely the way that you get there.

Second, educate yourself. Numerous books, apps, publications, and organizations can help you unpack your culture and your participants' culture. One of my favorite books is Erin Meyers's *The Culture Map*: Breaking Through the Invisible Boundaries of Global Business. (Meyers also hosts a country mapping tool to compare how two or more cultures give feedback and make decisions.) Hofstede-Insights.com has made its work to analyze the role of culture in business. I have also downloaded and used the Culture Wizard app to provide some broad analysis of themes and practices cultures hold; like Meyers's tool, this app offers comparison functionality. Also, reach out to your colleagues around the world for insights.

And speaking of leveraging your network, look beyond the people who hold similar job titles as you. I recommend that every instructional designer working in this space cultivate what I like to call "the coalition of the willing." Build cross-cultural relationships and then use that panel of colleagues to help you vet your design for below-the-waterline pieces of that cultural iceberg. For instance, in service of providing technical training for China, I have assembled a group of Chinese marketing, learning, finance, HR, and engineering folks to help me review and revise learning activities based on how they may land with their customers in mainland China.

Finally, as you dive down to view the ice below the waterline, remember that this ice has many facets. Culture is not a monolith; I've admittedly broadly appraised all the traits noted above. Are all North Americans X and all South Americans Y? Of course not, But holding those traits in mind as you start designing will help you uncover some of the assumptions you may hold unknowingly and help you design a session that will work with the cultural context rather than against it.

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- I thought of this activity as playful and fun but how is misrepresentation of a truth viewed in this culture? Is it safe? Is it playful?
- Honor and reputation are important in Indian business culture. Would having someone share an untruth cause the person, even temporarily, to become embarrassed and lose face?
- · Was it a gender issue? I was the only woman in a room full of men.

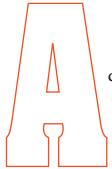
Here's what I should have done: I should have checked my assumptions. The activity's purpose was to start the day with a quick and fun assessment of how well participants knew each other at the beginning of the day. Perhaps considering some of the cultural differences would have pushed me to alter the activity to something that asked them to create a visual representation of who they are (for instance, ask people to quickly design their own T-shirt or to sculpt something out of Play-Doh) instead of asking them to provide a fact about who they are not. Or I could have read a series of statements (for example, "I played cricket this week") and asked that anyone to whom it applied cross from one side of the room

The redesign starts with a reflection on my own biases and assumptions.



BY PAUL J. ZAK

Gain better results with training that's immersive.



ccording to the Association for Talent Development's 2019 *State* of the Industry report, organizations spent on average \$1,299 per employee for training in 2018, and each worker used an average of 34 hours (slightly more than four eight-hour workdays) on formal learning. What is the return on that investment?

The best measures would be increased productivity or accelerated promotions. Another impact measure would be the recall of information presented during training. Unfortunately, learning architects seldom use those standards for the return on training investments. More commonly, learners complete a survey that asks how much they liked the training course, the trainers, the food, the venue, and so forth. In other words, they measure the meeting rather than the message.

There is another problem with that sort of post-training evaluation: People lie. They don't lie because they have evil intentions but because of how their brains function. Asking people whether they like something necessitates a conscious reporting of what neuroscience research has shown is primarily an unconscious emotional response.

Most people suffer from what I call a Freudian hangover, which is the belief that if individuals ask the right questions and dig deep enough, the unconscious can be made conscious. Balderdash. Copious neuroscience research has shown that conscious appraisals of unconscious responses poorly predict objectively observable outcomes. But new neuroscience research is tackling how to measure unconscious brain activity to make more accurate predictions.

Value in the brain

Published research in neuroscience, including from my academic lab, has identified how the brain values experiences. That is the key to accurate prediction. To do it, though, the research team first had to determine when something really has value. Based on the inaccuracy of self-reports, we did not want to ask people if they liked something. Instead, we took a functional approach.

We hypothesized that if someone's brain found something valuable, it would cause that individual to do something we could observe, particularly if the behavior were difficult to do. Put differently, the research team discovered the neural signals associated with value by working backward: It compared brain activity of those who responded to an experience to those who did not.

Our initial studies took blood samples before and after participants watched videos that highlight a cause that alleviates suffering. We paid participants \$40 and offered them a chance to donate some of their earnings to a charity associated with the featured cause. The research team compared changes in neurochemicals in those who donated to those who did not. Often, half of participants donated money to charity even though we stuck their arms twice with needles.

Something happened in their brains that caused them to voluntarily give up their hard-earned money. The data shows that participants almost always made donations when they experienced increases in two neurochemicals: one associated with attention (cortisol) and one associated with emotions (oxytocin). Measuring changes in neurochemicals enabled us to predict with 65 percent accuracy who would donate to charity.

Federal agencies noticed our lab's ability to predict what people would do and thought the research could help them. But there are only so many needle sticks people can endure; instead, we started to measure electrical signals in the nervous system, focusing on regions with high densities of receptors for the neurochemicals identified in our earlier studies. We fit participants in those experiments with a high-density electroencephalogram, an electrocardiogram, and finger sensors to capture electrodermal activity (changes in electrical resistance due to sweat).



Attention is metabolically costly, and the brain is stingy with its resources, so attention must be earned.

We measured more than 100 neural signals at up to 1,000 times per second, so there was a lot of data to pore through. Lab scientists built statistical models using the data to predict what motivated actions, but the majority of the neural signals were not predictive. The best models pushed our predictive accuracy to 82 percent using only four data streams.

Those studies show that an experience provokes action when two networks activate in the brain. The first network causes people to pay attention to the experience. Pay is the operative word; attention is metabolically costly, and the brain is stingy with its resources, so attention must be earned. The second brain network necessary to establish value generates emotional resonance with the experience and is associated with the release of oxytocin. The latter network tags the experience as important and causes the brain to store the information in a way that makes it easily accessible. Emotionally resonant experiences lead to both a higher likelihood of immediate actions and easier recall weeks or months later.

Further study required

I just summarized two decades of research, but how do I and other scientists really know the findings are correct? The short answer is replication and drugs.

Most of what your brain is doing now is keeping you alive. Only tiny ribbons of neural activity are responding to the information in this article. Extracting those tiny neural ribbons from the brain's background activity is difficult. It's especially challenging because most neural signals affect behavior in multiple ways. That means they fail to consistently predict what people

Although the science was giving stimulating results, our team was still skeptical. The importance of attention to motivate action did not surprise us; it was the necessity of emotional resonance that was a new finding. So, we dug deeper.

We needed a set of statistically robust signals for value. *Robust* means that the signals consistently predict behavior when one varies the measurement technique and outcomes. The research team identified robust neural signals by varying the experiences it gave participants and using drugs that switch on networks in the brain.

The lab developed a protocol to safely deliver oxytocin into living human brains. Synthetic oxytocin infusion intensifies emotional resonance, and if it changed people's behavior, then it would establish the causal effect of emotions. These experiments had people watch public service announcements after we administered synthetic oxytocin or a placebo up their



noses. Those who received oxytocin, compared to people given a placebo, donated to 33 percent more of the featured charities and gave the charities 56 percent more money. More importantly, a week later, the oxytocin group also remembered the details of the videos nearly twice as accurately as participants who received a placebo.

I have named the neurologic state produced when someone is attentive to an experience and it generates emotional resonance *immersion*. Immersion is why people cry at a movie even when they know the story is fictional and the characters are professional actors. It is why a great teacher can change a student's academic path. Immersion is why great training sticks.

Measuring immersion

When an experience such as training is immersive, its storage in long-term memory has tags on it that make it easier to recall. Think of your first boyfriend or girlfriend, what happened to you on September 11, 2001 (if you were in the US), or the

birth of your child. You easily remember those experiences because they produced powerful emotional responses in your brain. The science proves that neurologic immersion predicts immediate use of new information and its later accurate recall.

That's why immersion can be a measure of training effectiveness. It may even change how talent development professionals design and deliver training, including virtual training—if, that is, we could dispense with the blood, drugs, and big machines.

Fortunately, neuroscience research has revealed how to measure immersion from the nervous system. My company, Immersion Neuroscience, translated the research findings into software that measures immersion using a smartwatch or similar wearable. Although the specifics of the wearable and software are proprietary, it essentially senses and records activity of the nerves surrounding the heart to assess how engaged a person is with any experience. Then, software in the cloud uses the data to measure immersion for one to 1,000 people simultaneously and compare

it in real time. The approach enables users to collect data at scale and thereby identify when training works or falls flat.

Indeed, measurement is key. We were able to measure whether a training program was effective by comparing average attendee immersion to the immersion benchmark based on thousands of observations. The metric reveals whether the information is effectively entering and being stored in learners' brains.

As learning architects modify training, they should focus on driving up immersion. The science shows that information recall is easiest when it occurs during peak immersion moments. For example, presenting information using a narrative arc often produces an immersion peak.

Therefore, instructional designers can build narratives from the experience of a customer in a crisis or an employee who put in extraordinary effort to resolve a problem. Stories stick in the brain, and they stick easily if they produce peak immersion.

One company's path to immersion

In 2018, Accenture's internally facing talent research and innovation team started measuring immersion to determine whether training innovations more effectively put information into learners' brains. The data the firm uncovered has identified a set of training best practices.

Immersion will drop over time for anyone on stage. It doesn't matter how exciting, engaging, funny, moving, or talented speakers or facilitators are, immersion in learners erodes the longer facilitators are in "show" mode.

Build in learner participation. One way to reverse a slide in immersion is to provide opportunities for learner participation. When program facilitators ask learners to reflect on delivered content, immersion increases. When they ask learners to discuss new material with their peers, immersion increases even more. And when they ask learners to solve a problem or create something with new information, immersion increases the most.

Maslow's hierarchy always wins. During one session, an especially relevant and engaging facilitator did all the right things, and yet immersion was low. The team discovered that the data came from an impromptu session that had been scheduled during

lunch, and participants had not had a break. The physical need to eat, rest, and have a mental respite trumped participants' motivation to learn. Immersive learning is metabolically costly, so schedule breaks regularly and avoid working lunches.

Bob Gerard, Accenture's senior learning architect, reports that immersion audits have helped the company escape the tyranny of the 60-minute clock. After uncovering peak immersion moments through audits, he says, the firm began structuring training so that the most important information occurs during immersion peaks. Trainers now present information in blocks of no more than 20 minutes before participants engage in an active task. They also present information using a narrative arc, mix media types, and add in surprises to create immersion peaks.

Over time, Accenture's use of immersion data has extended beyond program evaluation; the firm has integrated it into learning experiences too. Gerard describes a sales training session during which an attendee practiced a sales pitch. The facilitator displayed real-time immersion data for the learners in the room as the sales associate practiced her pitch. She received immediate feedback on the parts of her pitch that caused immersion to trend upward, indicating its effectiveness. The firm also pinpointed when immersion dropped, letting her know it was time to make a pivot.

Continuously evaluating training programs by capturing learners' unconscious emotional responses has given Accenture the ability to identify trends, experiment with new learning approaches, and design learning experiences that create long-lasting value. Some of the insights it uncovered are already established best practices. But, according to Gerard, the team discovered that having scientific data to back up their learning modifications made it easier to persuade stakeholders that training had improved and was creating value for the company.

Paul J. Zak is the founding director of the Center for Neuroeconomics Studies; professor of economics, psychology, and management at Claremont Graduate University; and founder and chief immersion officer of Immersion Neuroscience; paul@immersionneuro.com.

Unleash and Build Leadership Capabilities

Executive coaching programs are beneficial for both existing and potential execs.

BY RITA BALIAN ALLEN

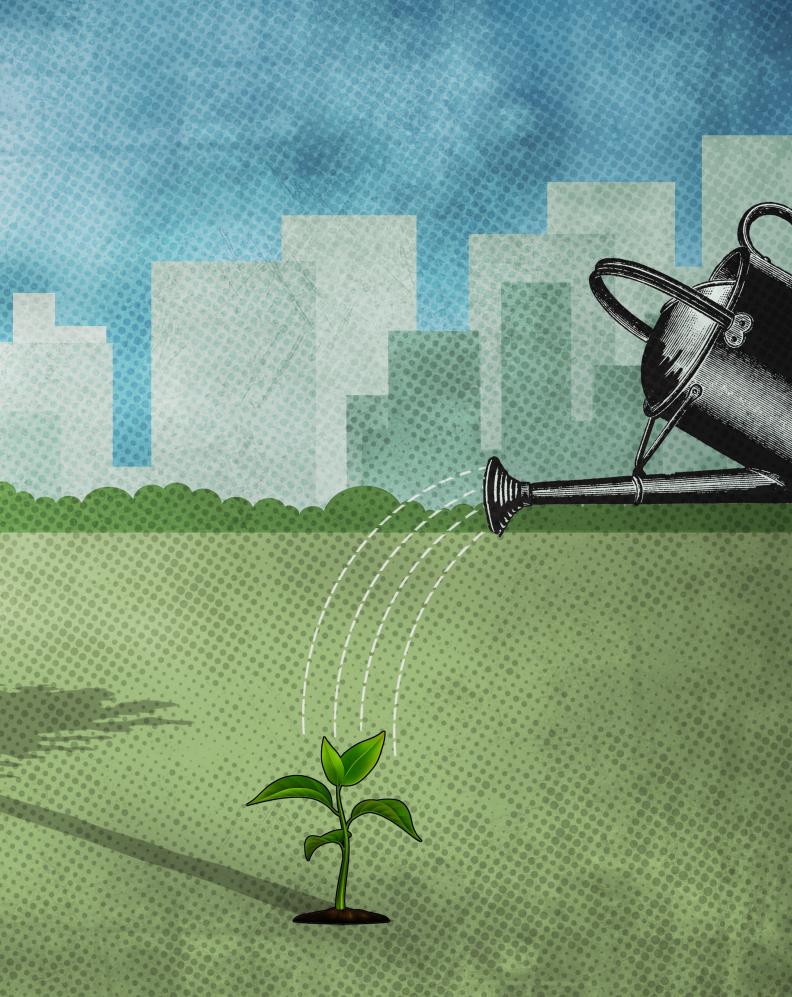


ILLUSTRATION | JOHN ANDERSON JR. September 2020 | TD 49



ne of the areas of most attention and priority to executives in the 21st century has been talent—the ability to attract, recruit, develop, and retain employees. It can be the single differentiator to gain competitive advantage within any industry. Many effective practices engage talent within an organization once it acquires them. One such practice that has grown in demand and need over the years is executive coaching.

A variety of specialty areas within coaching have evolved through the years, including career, team, business, life, marketing, and writing coaching. Not only are employers partnering with coaches, but individuals are engaging them as well. While employers have accepted coaching as a welcomed practice, an area of high demand within a company's strategic planning is executive coaching.

A foundation for a competitive edge

Executive coaching is about helping talented executives, leaders, and managers navigate through the process of growth, position themselves for success in building their leadership capabilities, and excel in specific competencies. It adds to a company's bench strength and elevates succession planning with intentionality.

Companies embrace and encourage executive coaching in many scenarios, including individuals assuming additional responsibilities and teams, transitioning into a new role, enhancing their ability to influence, developing executive presence, and moving from an operational to a strategic focus. They also embrace it for a variety of specific areas of personal leadership and social competency development.

Employers that invest in their leaders are illustrating the value they place on their talent's individual growth (and retention), in addition to enacting a culture that believes human capital is their greatest asset. That requires establishing a strong commitment to executive coaching and determining appropriate coaching programs internally or with the use of external services.

As part of a proactive development strategy, prioritize partnering talented leaders with a coach. Embrace the value those individuals bring to the company by offering them an executive coach as an additional resource to enable them to grow. Doing so says, "We believe in you, your abilities, and your potential so much that we are investing in your growth." Great leaders are lifelong learners, and executive coaching is one piece of that learning.

Implementing a successful executive coaching program requires the endorsement of senior leadership who view it as a necessary strategic imperative. Without that support from both a time and financial commitment, it will be challenging to achieve success.

Coaching objectives

Coaching is not ideal and can be problematic if the objective is remedial or to replace performance management. The best scenario for coaching is when employers approach it as a development opportunity for individuals to reach their utmost leadership potential, stretch out of their comfort

zone, and achieve greater value to affect both individual and business performance.

An executive coach's ultimate objective from the onset is to earn trust and build a relationship that creates a partnership with the individual they are coaching. The partnership's goal is for the coach to be a resource that helps individuals focus on their growth with clearly defined objectives. Coaches provide a neutral and objective perspective as a sounding board to encourage coachees as well as to challenge them to stretch in new ways and try new behaviors, strategies, and approaches. That trust is essential because it sets a strong foundation in the relationship to enable the coach to offer insightful and candid feedback needed throughout the process.

Methodology and process

The coaching approach can vary and should be customized to each person. However, there is a methodology applicable to all coaching engagements. From the onset, it is a conversation and partnership between the individual, that person's manager, the coach (internal or external), as well as an HR or talent development professional. The degree to which HR or talent development is a part of the coaching process can range from being closely involved for progress and update conversations within the whole process alongside the coachee's supervisor to only being an advisor who is called upon if needed. A typical coaching methodology includes:

- Defining focus—identify the developmental need, the specific area of focus for coaching.
- Identifying appropriate options—outline options (internal, external) that include success factors, and determine which will be most appropriate for the individual.
- Developing a relevant model—establish a timeline, the necessary feedback, and other aspects of the coaching process that will be relevant for the individual.
- Individualizing and personalizing based on needs—engage in a needs assessment with the individual and manager to personalize the process based on specific needs.
- Creating a process and structure—define and lay out the coaching process steps and specific milestones.
- Selecting tools and resources—depending on the specific need and objectives for coaching, determine the appropriate assessments and other tools to be used.
- Determining goals and outcomes—along with the individual's manager, agree upon desired outcomes as a result of coaching.

Talent development's role can be as a liaison to creating and managing the coaching relationship. Whether the organization has a large internal coaching staff or seeks out an external coach, it is a best practice to offer two to three coaches' profiles to the individual (and often their manager) to review, select, and interview to assess fit and expertise within the areas they are seeking assistance. Talent development professionals can also proactively seek a range of coaches with expertise in various topic areas to vet and add to their network. That allows for a constant cadre of executive coaches readily available when needs arise. In addition to acting as the liaison in selecting coaches for the company's pool, talent development professionals can play a role in managing the process either through all the steps or at certain intervals, depending on how involved they intend to be.

Every coaching engagement should comprise:

- Contracting and objective setting between the individual, that person's manager, HR or talent development, and the coach to identify parameters, costs, length of engagement, and specific areas of focus
- Assessment and feedback throughout the coaching process, including commitment from the individual and key stakeholders for successful implementation
- Development and action planning to identify appropriate development needs and establish action items and strategies for execution with specific timelines
- Implementation and coaching to carry out the engagement period with a determined structure of meetings and goals
- Evaluation and follow-up for accountability and ongoing success in preparation for transitioning to a noncoaching scenario

Finally, a coaching plan requires metrics that the company can capture in a variety of ways and customize for each situation. One way to define those metrics can be broken down into four steps:

- Initial—mutually agreed-upon objectives between the individual, manager, and coach
- 2. Midway—the creation and implementation of a clearly articulated development plan
- 3. Completion—assessment of the changed behaviors and achieved progress
- 4. Conclusion—formal evaluation of the coaching process, transition to noncoaching, and individual accountability

Self-assessments

Embracing executive coaching as a developmental strategy provides an opportunity for employees to

play a lead in their own growth and career management. Creating an effective coaching structure is a vital part of success.

The basic coaching model starts with identifying the individual's needs, followed by engaging in a comprehensive self-assessment process that includes 360-degree feedback and insights from others, leading to the creation of a development plan with new behaviors, strategies, and techniques the coachee

must practice and have reinforced for ongoing success. That offers a process that enables coaches to equip executives with the tools, resources, and confidence that empower them to continue their development well beyond the coaching period.

The use of informal and formal assessments is extremely relevant and valuable in a coaching partnership. Leadership begins and ends with inner strength, and effective leaders are authentic and transparent.

Establishing a Coaching Plan

Formulating a specific plan and structure at the start of the coaching engagement is critical. Coaches create and lead the plan in partnership with the coachee, the coachee's supervisor, and the talent development function. Ideally this plan will lay out meeting timelines, milestones, desired outcomes, and follow-up for evaluation and ongoing accountability of those outcomes. Coaching plans should include the following elements.

Needs assessment. Assess the appropriate objectives to be met during coaching via in-depth meetings with stakeholders. That could include, but is not be limited to, the coach meeting with HR or talent development, appropriate leaders, and the individual to assess current and future needs. The discussions could include detailed conversations around company culture, business goals, analysis of existing skill sets, and identification of any gaps in competencies or unrealized potential moving forward to define desired objectives.

Self-assessment. Begin working with the individual to conduct personal due diligence via formal and informal assessments, exercises, and exploration to better understand and appreciate their skills, competencies, values, strengths, interests, long- and short-term goals, specific development areas, and personal brand as a strong foundation for building their leadership capabilities.

Information and feedback gathering. Use a survey tool or conduct one-on-one interviews with a mix of leaders, peers, staff members, and other ap-

propriate stakeholders through a confidential and anonymous 360-degree feedback process. A best practice is for the resulting report to be shared only with the individual as part of their development.

One-on-one coaching. Begin biweekly, private, and confidential coaching sessions with the individual over a six-month period. The coach should be available for telephone calls between sessions should the need arise. During the entire coaching period, the coach's role is also to be a sounding board for real-time issues that emerge.

Professional development action plan or goal setting. The coach identifies and reinforces strategies, techniques, and tools targeted toward enhancing the identified areas within a development plan to address challenges in improving leadership skills, growing current relationships, and building heightened influence and working rapport. Prepare an action plan and execution strategy. Establish action items, goals, and strategies for execution with timelines, follow-up, and evaluation.

Communication and follow-up. The coach should maintain ongoing dialogue and collaboration with the leader and HR or talent development, as desired. Upon completion of the coaching sessions as well as at a midpoint interval, the coach should provide updates on progress, successes, and overall status of coaching. At the conclusion of the six months, the coach should offer insights on the need for any ongoing coaching services to achieve ultimate results.

Assessments enable individuals to explore more deeply and learn more about themselves as well as others, heightening their self-awareness and social awareness. The tools enable individuals to discover a level of personal depth regarding their personality, behaviors, style, strengths, preferences, and many other dimensions with which they would not otherwise have the opportunity to be acquainted. The process requires an openness to be vulnerable and dig deep to reveal their authentic self, and the results serve as resources to help individuals become their best selves in doing so.

While there are hundreds of excellent assessments and tools, selecting the appropriate ones is determinant on each coaching situation's objectives. For example, if someone is working on their ability to enhance interpersonal skills and relationships, the use of the Myers-Briggs Type Indicator, DiSC, or BAR-ON EQi 2.0 would be appropriate to help the individual influence and communicate with others. On the other hand, if a leader is focused on developing executive presence, the Hogan Personality Inventory would be an effective tool to give them a deeper understanding of their needs, behaviors, and value-add. A mix of several tools is often the most effective approach to provide a comprehensive assessment of many dimensions that are valuable through the self-assessment process.

Whether a company uses an internal or external coach, talent development professionals can be an asset and resource in identifying or administering the assessments. Depending on the selected tools, the talent development function can administer them internally. However, it is important to maintain the integrity of the process in keeping the results confidential (between the individual and coach). Also, talent development professionals must ensure the coaching engagement remains independent from the individual's HR file. That is an integral part of the coaching engagement's success and is a key distinguisher between development and performance management. It's also a common reason companies seek out external executive coaches—to offer neutrality and objectivity.

Case studies

Two scenarios with different coaching applications illustrate the value that executive coaching can offer.

Strategic leadership. A scientist within a biotechnology organization serving as executive director was looking to move away from a heavy research focus to one of business strategy, from both individual and team leadership perspectives. Offering a six-month coaching engagement using a variety of tools, strategies, techniques, and support to the leader enabled

the individual to use new approaches and shift their mindset to one of achieving results, not only through technology and research but through people.

Executive cross-cultural awareness and effectiveness. A senior marketing leader of a large major consumer products organization sought to enhance their cross-functional leadership skills with remote teams located in China and Brazil. The leader worked on developing skills in the areas of communications, conflict management, and emotional intelligence to provide greater impact on individual performance and team results. After a nine-month coaching period, the leader gained greater self-awareness and began the process of achieving a stronger ability to effectively understand, appreciate, and embrace cultural differences.

Great leaders are lifelong learners, and executive coaching is one piece of that learning.

Goals and outcomes

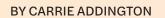
Through the coaching process, individuals can enhance their leadership potential and their value-add. It is a win-win all around because it enables the individual to grow and, in doing so, adds value to the person's team, department, and function, as well as the organization. That achieves a high level of engagement and commitment, empowerment, and accountability. It unleashes and builds leadership capabilities within the organization through their own growth as well as role modeling for their teams, which leads to increased effectiveness.

The end results include a direct impact on individual and business performance, which are drivers in building the business case for offering executive coaching. Organizations that choose to invest in their talent via executive coaching reap the rewards with highly empowered leaders who work toward reaching their utmost potential to be their best authentic selves.

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Use Your Facilitation Skills to Become a Better Leader





Correlations exist between leaders' and facilitators' behaviors and actions.





our leadership narrative was constructed far before you ever received a title or the related responsibilities. It comprises your view of the world, the workplace, and other individuals as they relate to your experiences, biases, and beliefs. Those around you experience your leadership narrative through your words, examples, behaviors, assertions, and decision-making skills. Being a facilitator is similar to leadership in those respects.

Leading with facilitation skills

Facilitation is leadership, and facilitators are leaders. Facilitation is the art of engaging participants in creating, discovering, and applying learning insights. Facilitators are often referred to as the guide on the side, serving as the question asker, discussion moderator, activity introducer, and performance developer. However, they do not do the work for the group; instead, they guide learners toward a specific learning outcome, helping them connect the dots along the way.

Core facilitation skills translate into leadership skills. Let's take a look at two examples.

Perfect the pivot. Facilitators are multifaceted machines, able to assess the learners and the environment while staying focused on the training session's goal. We know—sometimes instinctively—when to move forward, pause, or redirect. We are executing one thing while calculating next steps and timelines or how to expand or compress a lesson based on learner needs.

I was recently recalibrating my leadership vision and began mapping the correlation between facilitation and leadership. What traits am I carrying over from my facilitation style into my leadership style? And how does my facilitation skill set make me an effective leader?

Don't aim to fix. As a facilitator, I aim to facilitate, not fix. I'm not focused on managing, solving problems, or telling anyone what to do in my learning events. I'm a firm believer in facilitating an opportunity for people to arrive as their best selves

and trusting them as adult learners by giving them choices. I want learners to be affected, influenced, and inspired. That may sound grandiose, and it's meant to be. I know when I have missed the mark as a facilitator, and I know when I've done well—and I celebrate both.

Through years of practice and refinement of my facilitation skills, I can show up consistently and authentically to achieve my goals and put the learner first. Facilitators can apply that same process and concentrated effort to leadership.

Finding your leadership narrative

My father was my first tangible example of leadership. He ran a car dealership in small-town Indiana and was highly respected at his workplace and in the industry. He performed well, led large teams, and maintained a good reputation. His leadership style was multifaceted, but what I remember most are the times he talked about firing people. My father is a lovely human being, but what I held on to as a young child was that managers tell people what to do and how to do it; fire people; and yell, often at high decibels.

That formative example was solidified when, midway through my professional career, I was in a management position for which I was untrained and unprepared. Within 10 minutes of my first day in the position, I was pulled into an office and told I had to fire someone who had a 12-year tenure with the company. The reason? "It wasn't working anymore."

It seemed my first leadership experience was aligning to the formative examples I witnessed growing

up. Those experiences, examples, and stories helped to create my leadership narrative. But if narratives are created, then we can also re-create them.

To create a new leadership narrative, I set out to read widely, identify role models, and mine for leadership traits in case studies to determine how I wanted to show up as a leader. In other words, I became a student of leadership. I had to identify a leadership value system and align it to my personal value system to ensure the infrastructure could withstand setbacks and obstacles. It's essential to recheck your leadership narrative early and often to clearly define your boundaries and expectations. Nothing prepared me better for this task than my experience facilitating.

Over my career, I've thought long and hard about what matters to me as a facilitator and how I want to define my style and unique value that I bring to learners. Because of that intentionality, I knew I was facilitating according to my core values: empathy, safety, practicality, fun, humor, and integrity. So, how could I do the same for developing and defining my leadership style? And more importantly, how can you?

Align to your core values

Once I could clearly articulate my guiding values, first as a facilitator and then as a leader, I began the effort of operationalizing the values into behaviors for which I would hold myself accountable. If you haven't taken the time to name and describe your values, how can you live into them?

Integrity is a core value of mine in my facilitation and leadership styles. But what does integrity sound like in a conversation, what behaviors align to integrity, and what are the barriers to watch out for? Your personal values often align to your leadership values quite naturally.

In facilitation, integrity looks like me following up on additional resources promised during the training session or circling back to a participant's questions. In leadership, integrity looks like me doing what I say I'll do and showing up for my team in partnership with it. It means never asking someone on the team to do something I wouldn't do myself.

To make the most of this process, list your top five facilitation values, then jot down what each value sounds like (words) and what it looks like (actions). When you clearly understand what you value and how

It's essential to recheck your leadership narrative early and often.

you support it with words and actions, do the same for your leadership style. What's similar? What's different? Why do some values resonate in facilitation but not in leadership? Post the guiding values somewhere easily visible, and be sure to recalibrate regularly.

Identify leadership influencers

Next, establish a range of influencers—not just the Oprah Winfreys and Michelle Obamas of the world but examples of leaders from a variety of mediums, backgrounds, contexts, and cultures. From small-town heroes to social media influencers to industry-specific workers, catalogue anyone who has contributed a voice during a pivotal movement in history.

I gravitate to thought leaders and culture seekers, those who challenge their own thinking and use their voice to have an impact on others. The process of identifying influencers enables you to craft rich, tangible examples to look to for inspiration and clarity around how you see others exhibiting leadership (or facilitation) in action.

Define your why

As a young manager, I rushed out to buy a suit jacket—a brown blazer with gold button details—because I had seen it once in a movie, and the idea stuck. I had a specific vision of what a leader looked like, and I was going to follow suit. The problem with that mindset is that I'd be prone to adopt someone else's *why* and demonstrate leadership that's in alignment with someone else's predefined strategy. That's not leading; leading is about being authentic.

To better understand your why, study many perspectives. Cast a wide net to learn from a multitude of thought leaders and game changers. Some of my favorite sources that have directly affected my

A Comparison of Facilitators' and Leaders' Roles

	What Facilitators Do in the Training Room	What Leaders Do for Their Teams
	Establish buy-in and relevance of content for learners.	Guide the team through motivation, goals, and values.
	Manage time against outcomes.	Self-manage time and goals.
	Demonstrate strong organizational skills.	Demonstrate accountability and responsibility.
	Give clear instructions for learners to be successful in exercises.	Communicate intention and need.
	Create opportunities for flow of thought.	Demonstrate effective communication.
	Inspire others to discover the impact of the content on their situation.	Coach or mentor to allow for individuals to reach their highest potential.
	Demonstrate effective presentation skills.	Define a clear vision.
	Maintain focus and flexibility.	Manage complexity and prioritize.
	Manage group dynamics.	Foster creativity and innovation.
)	Share relevant examples, stories, and analogies to further learning.	Build a team of contributors and thinkers to foster collaboration.
	Ask engaging questions and build on comments to elevate the conversation.	Train and develop their team.
	Lead with emotional intelligence.	Lead with emotional intelligence.
	Be a lifelong learner.	Show learning agility.



leadership behaviors are Tom Rath and Barry Conchie's Strengths Based Leadership, Brené Brown's dare to lead philosophy, Marshall Goldsmith's leadership principles, and positive psychology. Reading widely enables you to identify what works for you and what doesn't in each philosophy and essentially create your

own blend of approaches that are central to your style. For example, my key leadership principles are:

- · Lead with empathy and listen intentionally.
- Use clear, authentic communication.
- Show up as human, follow up as a leader.
- Establish a clear vision and align efforts to that vision.
- · Guide others on establishing boundaries.
- Embrace continuous feedback and discovery conversations.
- · Autonomy is not a bad word.
- Quietly remove roadblocks to allow others a space to thrive.
- · Champion the team and the effort.

Applying facilitation style to leadership style

As COVID-19 continues to permeate the world world, articles about how to lead during a crisis have been flooding my news feeds. The reality is that during a crisis, people are forced to approach things in a way that feels unfamiliar. It requires adaptation, reassessment, and a focus on not only what others need but what you as a leader need. That sounds a lot like learner-centered theory.

The key is considering how to maintain a consistent leadership presence, ensuring that you're leading in all facets of your life—at home, in your community, and with family and peers—the same way you lead at work. That enables your leadership style to become more of a ritual and less of a concentrated effort.

Leadership is not a brown blazer that we put on and take off. Like a facilitation style, a leadership style is something you must develop and hone over time but that is anchored in your core values. As I began writing this article, I became curious about how a person's leadership style tends to shift in certain scenarios. So naturally, I began posing the following question to colleagues: "Why does our leadership style shift in the workplace?"

A leadership style is something you must develop and hone over time.

No one needed clarification, and the consensus was that there's a lot of advice telling people how to show up and how to be effective—so much that we forget how to do what feels intuitive. We mechanic the intuition right out of our leadership style. Just like I wouldn't use humor in my facilitation if humor doesn't feel authentic to my facilitation style, I wouldn't lead by adopting a participative style if a delegative approach doesn't feel authentic to my leadership style.

Showing up authentically

Writer Annie Dillard famously said, "How we spend our days is, of course, how we spend our lives." With the average US worker spending more than 90,000 hours of their life at work, wouldn't it be worthwhile to ensure we create a space for showing up authentically, leading with intention, and evaluating the impact we can have on one another?

Now more than ever, the talent development industry needs leaders: leaders to ask questions—the questions whose answers lead us somewhere we've never been; and leaders to redefine our roles in a world thrust into asynchronous communications, virtual classrooms, and examining the efficacy of what's considered traditional.

In a conversation with a team member recently, he and I spoke of what's next in our role as training delivery professionals, to which he said, "What are the new best practices?" It was a brilliant question.

There are no checklists or best practices for our current climate or for leadership. This is a time for everyone to lead. It's a time for reexamining, redefining, and once again recalibrating to carve a path for what's next for our roles, the teams we lead, and the entire talent development landscape.

Carrie Addington is manager of facilitator development and strategy for ATD; caddington@td.org.

Bridging the Digital Skills Gaps

BY SHANNON WERTH, Marketing and Events Coordinator, MHS Talent Development

OVID-19 has accelerated the speed and scale of digital transformations in the workplace. Beyond technology, teams are relearning how to leverage their soft skills in the nuanced world of remote work and adapt their activities to reinvented business models brought on by the pandemic.

It's no secret that technology has exponentially propelled the need for agility and learning in the workforce, and leaders can help their teams bridge digital skills gaps best by first honing in on the imperative skills needed to succeed.

Talent planning

Leaders are faced with a multitude of challenges when it comes to training, learning, and development, and they must plan and anticipate the skills their employees need to thrive during constant organizational changes in growth and structure. The following questions can help your talent planning efforts while preparing for ambiguity:

- Where are the skills gaps in our current workforce? Where do we see gaps emerging for the workforce in the future of business practices?
- Should we rethink our approach to specific roles, responsibilities, and project teams now that we have identified these skills?
- With digital workplace trends accelerating at a rapid pace, how can we better adapt our long-term strategies for short-term agility?

Proactive and pragmatic talent planning is essential for business success (and survival).

Soft skills in a digital world

While navigating the impacts of technology on workplace performance, leaders are being forced to reinvent the ways their people interact with customers, stakeholders, and each other. To continuously deliver value and drive results, ask yourself the following questions and consider the digital alternatives to traditional ways of doing business:

 How can you foster and nurture new and existing customer relationships? (In lieu of taking a client to lunch, could sending an Uber Eats e-gift card offer the same sense of goodwill?)

- What are the remote rules of engagement? What type of/how much communication and visibility do we expect from our employees? (Are video calls preferred over voice only?)
- What tools and resources are we offering or suggesting to our employees to help them develop digital soft skills?

Interpersonal skills, among other key emotional intelligence competencies, must be redefined and redeveloped to adapt to the demands of remote work.

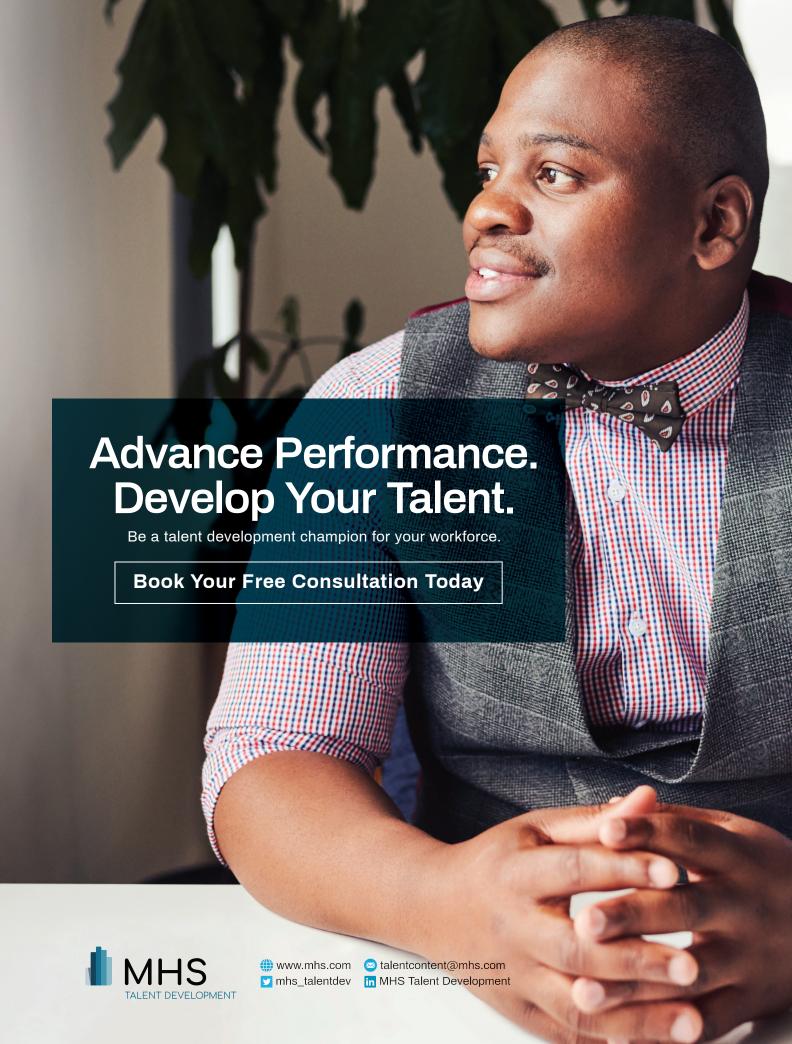
Organizations must focus on their talent now more than ever. Develop your talent today to thrive in the workplace of tomorrow.

Employee experience

Organizations that implement training and development programs for the advancement of their employees' skills can see a substantial improvement to their bottom line, and data-driven tools help prove both qualitative and quantitative ROI. Consider these tips when creating and implementing a talent development program:

- Integrate assessments to help benchmark performance, create action plans, and drive development conversations throughout the employee life cycle.
- Create a culture of learning by providing opportunities and resources for professional development, including experiential learning, webinars, and coaching.
- Invest in team-based development with simulations, team-building workshops, and 360 assessments.

Leveraging the right tools helps organizations maximize employee performance, talent retention, team collaboration, and leadership effectiveness.



Considering Coaching? Begin the Journey Today

BY ABBY TRIPP HEVERIN, Assistant Director of Communications and Awards, ICF

epleted energy or a feeling of exhaustion. Increased mental distance from or cynicism with one's job. Reduced professional efficacy.

Last year, the World Health Organization (WHO) added burnout—indicated by the symptoms above—to its *International Classification of Diseases*, the organization's diagnostic handbook for physicians.

Burnout transcends industry sectors and job classifications: It can impact employees at every age and stage of their careers, impeding health and well-being and posing a roadblock that keeps individuals from achieving their personal and professional goals. But partnering with a professional coach can make a difference.

Siba Ayoub experienced the impact of coaching firsthand during a period of burnout earlier in her career as a talent development professional.

Having transitioned from a career in archaeology into the hospitality industry, she watched as her colleagues were promoted and recognized while she stood still. She was becoming more and more frustrated with her job, with not being noticed, not advancing.

"I was living in frustration and emotions full of negativity," Siba remembered.

Siba's organization offered a portfolio of leadership development options for women, including the chance to partner with an International Coaching Federation (ICF)-credentialed coach. Siba began working with Dubai-based ICF Professional Certified Coach (PCC) Suhair Fakhoury.

ICF defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. Coaches honor the client as the expert in his or her life and work and believe that every client is creative, resourceful, and whole.

ICF offers the only globally recognized, independent credentialing program. ICF Credentials are awarded to professional coaches like Suhair, who have met stringent education and experience requirements and have demonstrated a thorough understanding of the coaching competencies that set the standard in the profession. Achieving credentials through ICF signifies a coach's commitment to integrity, understanding, and mastery of coaching skills and a dedication to clients.

"At the beginning, I was very resistant. She kept digging deeper until I got all the questions for the answers within me. Suhair gave me this space to speak up and to talk," Siba recalled.

Because of coaching, Siba was able to become less reactive to her situation and more mindful of her own attitudes and behaviors. These positive changes allowed her to move forward in her leadership journey, with her regional director recommending her for a promotion soon after she completed her coaching engagement with Suhair

Thanks to her more positive outlook, Siba was able to have a greater positive impact on her colleagues, her organization, and her community. As a result of her above-and-beyond contributions, she was recognized with her organization's top honor for employees.

"I believe that I have the right tools to help me with any struggles I could face in the future," Siba said. "There's no obstacle that I can't overcome."

Her one piece of advice for emerging leaders who are considering coaching? Begin the journey today: "Don't wait until you get burnt out."



Partnering with an ICF coach helped Siba overcome burnout. Watch her story and discover how coaching can enhance engagement and help employees shift from surviving to thriving at **experiencecoaching.com**.





The Future of Microlearning

BY RONNA DETRICK, Senior Vice President of Learning, Fierce Conversations

he world of leadership development training has been in flux for some time now. The latest craze? Microlearning. More and more businesses are demanding scalable learning that can be implemented at lightning speed, is easily digestible, and most importantly, sticks.

It's no surprise that bite-sized training has quickly become so popular. Recent research has shown that microlearning improves training engagement by 50 percent while also enhancing knowledge retention by more than 20 percent. Not to mention, studies have shown that this quick and easy learning modality means employees are spending up to 40 percent less time in training.

That said, microlearning is far from some one-size-fitsall modality that guarantees these impressive ROI stats with little effort. Just like with other training methods, content that truly resonates with learners' actual real-life challenges and is easily understood and accessible are all vital elements for success.

This is why the new trends with microlearning have been heavily influenced by virtual reality—type technology. This means no more boring training sessions that have no relatable substance need to be coordinated around attendee schedules and lack any form of "engaging" learning content that's forgotten within minutes.

Instead, this new form of interactive microlearning utilizes virtual technology, like 3D simulations, that allow learners to be taught in a digital world that looks and feels like their own while getting real-time feedback in a safe environment. This new form of learning is also customizable, so training ends up truly solving a company's individual, unique challenges with relatable solutions.

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MY CAREER

Turn Self-Assessment Insights Into an Action Plan

Vow to grow and improve.

BY JEFF O'MALLEY

n accurate self-assessment is a gift you give yourself. You can gain invaluable insight to help you develop your strengths, focus your energies, and ultimately reach higher performance levels. Such information can also reveal weak spots—that is, areas where you need to learn and grow. In short, a good self-assessment—one that is accurate and specific—can get you closer to becoming your best self.

Yet the exercise is inherently subjective. Everyone has biases, whether for good or for ill. We oversell and undersell ourselves, sometimes in subtle ways. Even more commonly, we have blind spots that are influenced by narratives such as "I'm not good at math" or "I'm so disorganized." On the other hand, we may see ourselves through rose-colored glasses as, for example, being really good with people or being a great communicator.

But what if you're receiving a significant amount of feedback indicating that you may not be as effective as you think? Four essential practices can help you focus your efforts to develop yourself, overcome common barriers, and make progress in your growth.



The purpose of a self-assessment

Like any assessment, whether of skills or personality, the central goal of a self-assessment is to get a baseline of where you are now so that you can focus your talents and energies and reach your highest level of performance. The closer you can get to your ideal fit in role and function, the lower the opportunity cost and the higher your engagement.

Better engagement leads to better results, quality, and long-term success. Not only does a lesser organizational fit lead to lower engagement, but it also comes with a personal toll. Career-wise, you can discover or affirm your areas of strength—preferences, in Myers-Briggs language-through an accurate selfassessment. Then you can concentrate training in areas in which you need growth and make decisions about your choice of profession or job accordingly. At the macrolevel, those decisions can influence your choice of career; at the microlevel, they may entail taking a research position over one with a teaching focus if you are more driven by data and analytics and thrive considerably less as a people person.

If you are in a leadership position but not much of a people person, it's important to learn how to communicate



Steps to Act

on Your Plan



Write things down. Putting pen to paper pushes you to articulate and clarify your goals, and it builds in accountability once you've identified what you want to accomplish.

and connect well because of the impact you have on the team and on your organization's mission. By pinpointing areas you know are weaknesses or are simply underdeveloped, you can make targeted efforts to grow.

It's not about becoming someone you're not; it's about being authentic and more effective. As Rob Goffee and Gareth Jones write in *Why Should Anyone Be Led by You?*, "Be yourself, with more skill."

What makes for a successful self-assessment? The answer is rather pragmatic. The best kind of self-assessment gives you an accurate picture of yourself, your strengths, and your interests, along with areas that challenge you.



Getting the most from self-assessments

The good news is there is much you can do to set yourself up for success. Here are a set of interrelated practices to help as you prepare for and take a self-assessment and then put it to use.

Develop curiosity and courage. Getting the benefit from an assessment starts with being genuinely interested in what you find. Curiosity and courage are interconnected. Can you handle the truth of what you find? Not just the negative things but promising ones as well? Professor and author Brené Brown expresses that dynamic well in *Rising Strong*: "You can choose courage, or you can choose comfort, but you cannot choose both."

By taking a fresh look at yourself, you have a chance to grow—and growth, by definition, is changing from the old to the new, hopefully something better. But change takes work and typically is not easy.



Envision how much greater your impact would be if you learned from keen self-assessment.



Commit to change and growth. Two good basic questions to ask yourself are: Do I really want this? and Have I counted the cost? There is a tougher question, though: Do I recognize my need to grow?

Humility is included on many lists of essential leadership traits, with Jim Collins's seminal book *Good to Great* a prominent example. You may give lip service to growth, but until you admit you need to improve, you're not truly committed. Without that commitment, you are less open to learning and developing and less likely to do the work that is required.

In his book *Better* about improving performance in medicine, surgeon and writer Atul Gawande takes this challenge a step further: "Ingenuity is often misunderstood. It is not a matter of superior intelligence but of character. It demands more than anything a willingness to recognize failure, to not paper over the cracks, and to change. It arises from deliberate, even obsessive, reflection on failure and constant searching for new solutions." Gawande's principles apply equally to organizational and individual performance. When you identify areas for growth or opportunity, are you willing to invest in

yourself and put in the effort, or will you just "paper over the cracks"?

See the need. A self-assessment can help you recognize the critical need to adapt and focus your efforts more on addressing current realities. With terms such as upskilling and reskilling now commonplace, all employees must change to remain current and continue contributing.

Being nimble or agile is not special anymore; it's a must. And on a more basic level, if you're not strengthening weak areas or, worse, you're blind to them, you're in effect operating in the dark, unaware of the impact you're having. On the brighter side, envision how much greater your impact would be if you learned from keen self-assessment and the ensuing insights, and developed a solid plan to address areas you need to strengthen.

Push past limits. Be willing to challenge long-held biases and old narratives. The stories you tell yourself, along with the ones others tell you, often hold truths. But some do not, and other stories are outdated. By moving beyond stories that hold you back and pushing past limits you've set on yourself, you open yourself to new possibilities. Growth is about improving your weaknesses as well as reaching for opportunities that open you to new possibilities.

To mine untapped potential and take on stretch opportunities, you first need to accept the notion that you have potential to fulfill and the ability to take on the opportunity. Then you must be willing to make them a reality. Many people attest to being amazed at where they are now in light of the limiting thoughts that held them back previously. After assessing themselves, incorporating other feedback,



Work with a partner. Most people benefit from having someone who will hold them to their word. Accountability actions can range from asking you questions to nudging you to lifting you up if you get discouraged.



Consider a coach. Good coaching helps you tap into your intrinsic motivations and identify both broad direction and specific actions that make sense for you. Effective coaching takes place in a trusting relationship in which the coach uses powerful questions arising from focused conversations.

and taking action, they achieved not only exponential growth but fulfillment.



How to keep moving forward

So, after taking a self-assessment and committing to change, how do you take action and—more importantly—keep up the momentum?

Plan purposefully. Doing a solid assessment and accepting what it shows are essential first steps. But to grow, you must act. Develop a plan that has distinct outcomes and reachable goals, often called an individual development plan (several examples are available online). It can be as simple as two to three things you're going to work on—or even one behavior you will track.

Ask for help. A trusted mentor or coach who can work with you on designing the plan and setting outcomes makes the plan more achievable and builds in accountability. Mentors' and coaches' accountability, insights, care, and encouragement are essential elements to sustained learning and growth.

Envision your desired state. An individual development plan is a tool to help you get where you want to be. An effective plan requires a clear vision of what you would like to change. And that brings us back to self-assessment. A desired state presupposes a current state. The clearer you are about your current state, the more surely you will proceed toward where you're going.

Onward

V See the promise of your best and better self. Have the courage to look at your current state, and don't forget that it means doing an accurate self-assessment. Give yourself permission to dream, practice, and stumble as you make progress. Try focusing on the ways you want to contribute more, and then dive in. You, your workplace, and the world will be better off.

Jeff O'Malley is director for executive and team coaching at the Partnership for Public Service; jomalley@ourpublic service.org.



Self-Assessment at Partnership for Public Service

The Partnership for Public Service—a nonprofit, nonpartisan organization that strives for a more effective US government—developed a model to help government leaders at all levels serve at their best.

Given the comprehensive scope of the leadership traits and practices in the model, the organization opted for a streamlined self-assessment that would steer leaders to pinpoint growth areas and then delve into a rich set of resources and series of challenging self-coaching questions in competencies ranging from empowering others to embracing risk and uncertainty.

For example, under the "Achieving Results" heading, two of the questions are: How am I holding myself and my team accountable toward our goals? and How are we being accountable to our customers? And under the "Engaging Others" heading is this question: How do my decisions enhance diversity, equity and inclusion in the workplace?

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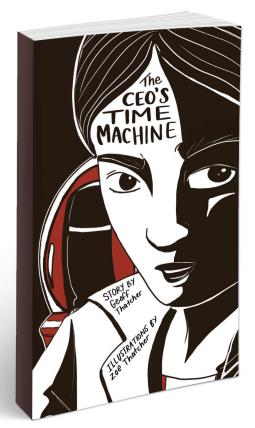
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An Unexpected Journey

The CEO's Time Machine

By Geoff Thatcher Casa Flamingo Literary Arts, 86 pp., \$24.99

REVIEWED BY MARCI MORFORD

his book is timely, refreshing, and both pleasant and incredibly fast to tear through. Thatcher has a solid point to make, and the mechanism through which he makes his points is what gives the book power. *The CEO's Time Machine* takes you—a leader of a company, if you're among the intended audience—on a short trip through a big, mysterious garage alongside the protagonist. She is a bright, ambitious future CEO herself, and she's on a journey to discover the secret to running her company, led by her highly respected predecessor.

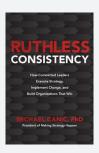
In this garage, we find old-timey cars and trains, some doorways, and even some gambling and gaming tables occupied by real-life humans. It also holds a time machine that ultimately belies the reason her company has, and can continue to be, so successful in its industry. The book's beautiful tricolor illustrations by Zoe Thatcher bring the journey to life.

The style may sound a bit like *Alice in Wonderland*, and honestly it's not that far off. But in reality, it is more like John Kotter's *Leading Change* had a love child with Spencer Johnson's *Who Moved My Cheese?*

At the book's conclusion, the author hopes that leaders and future leaders deeply understand the importance of creativity, open-mindedness, and listening in service of innovation. Without coming out and saying it, as many leadership books do, *The CEO's Time Machine* illustrates the importance of hearing your brightest, and often youngest, employees with a wide, open mind to ensure your company never goes the way of Oldsmobile or the cassette tape.

During current times in particular, when our world is transforming, the importance of being able—and willing—to change, innovate, and adapt is crucial. Doing so in ways that would have been laughed at as ridiculous is paying off for many companies, while others that take more traditional or conservative routes are struggling and failing. This book, which will take less than an hour to read, is a great way to prepare your mindset going into conversations about how your business can navigate our new, uncertain world.

Marci Morford manages onboarding, culture, and innovation programs at Salesforce; marcimorford@gmail.com.



Ruthless Consistency: How Committed Leaders Execute Strategy, Implement Change, and Build Organizations That Win

Michael Canic McGraw-Hill Education, 304 pp., \$27

The majority of all organizational change projects fail. But if you ask Canic how leaders can drive in their favor the odds of winning, he'll tell you they must do three things: Develop the right focus, create the right environment, and build the right team. Divided into five parts—The Reality, The Right Focus, The Right Environment, The Right Team, and The Right Commitment this book contains principles for executing winning strategies. Though designed with middle-market business leaders in mind. Ruthless Consistency shares principles you can put into play at organizations of all sizes.



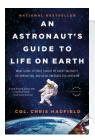
We're All in This Together: Creating a Team Culture of High Performance, Trust, and Belonging

Mike Robbins Hay House Business, 208 pp., \$25.99

Fostering strong team dynamics among workers is critical to every project's success in the workplace. In We're All in This Together, Robbins shares the secrets of building and sustaining a strong team. The book is organized into four key pillars the author says are essential to successful team dynamics: Create psychological safety, focus on inclusion and belonging, embrace sweaty-palmed conversations, and care about and challenge each other. As Robbins expands on each pillar, he equips readers with insights, ideas, tools, and techniques to enhance their team leadership skills. The content makes this read a good choice for individual as well as team reading.

FROM OUR AUTHORS

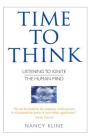
What's on Your Bookshelf?



"An astronaut is someone who's able to make good decisions quickly, with incomplete information, when the consequences really matter."

An Astronaut's Guide to Life on Earth: What Going to Space Taught Me About Ingenuity, Determination, and Being Prepared for Anything by Chris Hadfield

How does a Canadian become one of the longest serving NASA astronauts? Hadfield shares a story of persistence and having fun while making an impact. He also discusses how to play a guitar in space and why slowing down to look out the window once in a while is so important. It's funny and inspirational. **–Paul J. Zak**



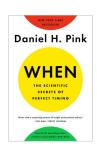
Time to Think: Listening to Ignite the Human Mind by Nancy Kline

Whether for business or personal reasons, everyone needs to give themselves time to think about what they want from a situation, an event, a relationship, or life itself. Kline lays out a wonderful way to be of service to others and help them think. **–Amanda Carrothers**

"For most of us, mood follows a common pattern: a peak, trough and a rebound."

When: The Scientific Secrets of Perfect Timing by Daniel Pink

Pink talks about the importance of timing and helps you determine when to kick off a new project with a customer, when to drive activity, and when to promote—in other words, how to make sure everything you do is successful. **–Cheryl Lasse**



learning blueprint

TECHNOLOGY APPLICATION

Engage Frontline Workers With a New Communication Strategy

A standardized communication system ensures nondesk employees don't miss out on key messages.

BY JENNA EASTMAN

ight out of 10 employees didn't work at a desk in 2018. But even for a group that's more than 2 billion strong, frontline (or nondesk) employees are often left out of traditional corporate communication.

That negatively affects employee happiness and morale, as well as companies' bottom lines. In fact, Gallup reports that disengaged employees cost US companies between \$450 billion and \$550 billion each year. When companies recognize the value of employee engagement and invest in it, they're four times more profitable.

Frontline workers, especially those in industries like retail and hospitality, have unique value in that they heavily sway customers' decisions. The more engaged customer-facing employees are, the more attentive they are to customers' needs. For those reasons, employee engagement and connection with the mobile workforce is more important than ever.

Although frontline employee engagement is imperative, it does come with its own set of challenges. For starters, frontline workers usually don't have corporate email accounts or other standard communication software—even though 90 percent of them say seamless access to information is critical at work.

Frontline employees, then, are left to rely on traditional channels, such as a bulletin board or printed newsletters, to get their information and company updates. Those methods are neither

traceable nor trackable. In addition, print materials can be expensive to produce.

The solution for overcoming frontline communication challenges? Implementing technology solutions that allow for traceable, measurable, real-time communication.

What it is

There are a few channels companies can use to communicate: mobile phones (which require an app), computers (where employees can use web browsers and websites to access information), or other digital devices (think wearables or TV screens that function as digital signage). However, without clear goals, objectives, and metrics, it's difficult to get leadership buy-in to standardized communications. And without standardized communication systems, employees find other means to communicate among themselves across unsanctioned platforms. There, rumors can spread, and leaders aren't able to see or address them, which can be a compliance and security nightmare.

As recently as January 2019, 53 percent of frontline workers used messaging apps up to six times daily for work-related reasons, but 68 percent noted they would stop if they could access internal communication tools.

With some due diligence, companies should be able to find a solution that meets their needs. The key is to make sure the imple-



CHECKLIST
Implementing a New
Communications
Strategy



Secure the C-suite's buy-in of the internal communication solution.



Create an internal communications calendar.

mented solution integrates with other tools and software the company already uses.

How it works

Mobile apps enable employees at any level to instantly connect with managers and peers and grants 24/7 access to company information and training procedures. Apps also allow a seamless flow of information from company leaders to frontline employees and vice versa.

Guidelines

Before investing in a communication platform, take these steps to successfully transition to the new tool.

Get buy-in from the C-suite. Employees will follow the example set by upper management. If they see their CEO and other C-level executives sharing thoughts, feedback, and praise using the communication platform, they'll likely log in regularly to see what's new. Plus, leaders' buy-in is essential for funding and ongoing support of communication tools. Set clear, measurable goals to determine whether the new tool is successful and to prove its worth with data. When it's time to renew, the more engagement metrics there are to show executives, the better.

Create an internal communications calendar. Develop an editorial calendar populated with the content you plan to produce, as well as cadence and sharing details. Aim for at least one new post in each news feed or touchpoint per day to keep employees regularly coming back for updates.

Train small groups. Host onboarding training sessions with new hires to show them how to use the platform, and discuss the types of internal communication the company will share. If the company trains employees from day one, using the com-

RESOURCES

Harvard Business Review Analytic Services. 2020. The New **Decision Makers:** Equipping Frontline Workers for Success. Brighton, MA: Harvard Business School Publishing.

Perkins, B., and R. Thomson. 2017. The Connected Worker: Clocking in to the Digital Age. London: Deloitte.

Richardson, T. 2017. "No Email, No Problem: Creating A Feedback Loop With Non-Desk Workers." Forbes, April 11. forbes.com/ sites/forbeshuman resourcescouncil/ 2017/04/11/no-email -no-problem-creating -a-feedback-loop-with -non-desk-workers.

munication platform becomes business as usual. But if they get used to texting colleagues about business-related projects, that behavior will be difficult to change later. Make sure to provide training that meets existing employees where they are; it should be easy to access training in the field and in the office.

Generate buzz. Remind employees about new tools by reinforcing the benefits of using them around the workplace. Don't be discouraged if adoption is low at first. The old advertising rule is that it takes seven exposures before a message sticks, and the same rule applies here.

Bring out employees' competitive **sides.** Gamification can get employees fired up and motivated. For example, hold a contest for the highest activation rate by team and offer a prize to the winners.

Results

According to Deloitte, employees waste 8 percent of their workweek searching for information. At the same time, more than 70 percent of frontline workers believe new communication tools could boost their productivity.

When all an organization's employees are informed, connected, and empowered, the business benefits are endless. Employee engagement increases, retention improves, and productivity skyrockets. And when employees can access training materials and information seamlessly, they can also offer the right products and services to the right customers, boosting customer relations. That way, everyone wins.

Jenna Eastman is head of customer success for North America at Beekeeper, a mobile communication platform; jenna.eastman@beekeeper.io.



Train new employees on how to use the communication tool and ameliorate any issues with existing employees.



Publicize the new tool using branded visuals.



Promote it through friendly and creative competition or gamification.

quick tips

Ways to Prepare for Adobe Flash Expiration

Adobe has announced that, as of December 31, Flash-based content will no longer work, and the company will no longer support the technology. Plan ahead to ensure that learning content isn't left in the dark.



Audit and assess.

Conduct a systems audit to flag Flash content and assess needs; such files usually have .swf, .flv, .f4v, .f4p, .f4a, or .f4b extensions, which you can find by searching the content package.

Plan and prepare.

Document the audit findings, devise a plan to complete file updates and conversions, and share the plan with stakeholders to prepare them for the changes.

Retire and remove.

As soon as possible, remove content that's no longer usable or outlived its shelf life so that users or visitors will not encounter a page where nothing works.

Renew and replace.

Update any content you can convert or modify with other supported technologies, such as HTML5. Otherwise, you will need to replace content that you cannot convert.

Develop and deploy.

Replace unusable files with newly developed content, allow enough time to work through the process, and perform a thorough review and testing before deployment. Launch the new content before December 31.

2021 ATD BEST Awards Call for Entries



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