

## Learning From the

# Best

*The recipients of  
ASTD's 1996 Best Practice  
Awards provide models  
for success. Here are  
the award-winning  
companies and their  
innovative practices.*

BY LISA LUCADAMO  
AND SCOTT CHENEY

**T**HE SEARCH for best practices in training goes on in every organization. Articles on how to identify and learn from best practices appear everywhere. Conferences and workshops are popping up as fast as brochures can be printed. And the number of firms that maintain a database of best practices seems to increase every day.

Identifying and emulating best practices make sense, as the pressure builds for training and performance-improvement professionals to demonstrate the value they add—and as the speed of corporate change continues to accelerate. No individual, no training organization, and no company is able alone to swim ahead of that wave of change. The cross-company sharing of best practices has become common out of necessity.

Since 1994, the Benchmarking Forum of the American Society for Training and Development has been seeking and recognizing best practices among its members. In 1996, the Benchmarking Forum began accepting submissions from nonmembers. The forum recognizes results achieved through the use of practices, interventions, and tools from the entire scope of workplace learning and performance. Among the 13 practices selected for recognition in 1996, four received Best Practice Awards for demonstrating clear and measurable results in achieving organizational effectiveness. The Benchmarking Forum awarded the other nine practices with Best Practice Citations for showing great promise.

The companies using the practices that received Best Practice Awards are

- ▶ Allstate Insurance Company
- ▶ California State Automobile Association
- ▶ Pacific Gas & Electric
- ▶ Swiss Bank Corporation and Trans-Cultural Relations.

Allstate, with 30,000 employees, implemented companywide diversity initiatives through an integrated, comprehensive process of planning, implementation, and measurement—using communication, training, and performance management.

California State Automobile Association implemented an online system to cross-train customer service representatives in solving a customer satisfaction problem.

In the face of shrinking budgets, Pacific Gas & Electric designed and implemented a model for transforming a technical training department into a performance consulting organization.

Swiss Bank Corporation and Trans-Cultural Relations identified criteria and designed training for successful expatriate employees in response to growing globalization of the bank's business.

ASTD and the Benchmarking Forum have as goals to share the practices and learning of award recipients in order to advance the learning of all training professionals and expand knowledge in our field. To that end, here are the best practices in the four award-winning companies.

## Allstate Insurance Company

### **Best Practice: Implementing a successful diversity initiative.**

At Allstate Insurance, diversity is a critical issue. The company's 30,000 employees are tremendously diverse, as are the company's customers and policy holders. Allstate realized that to continue to achieve desired business outcomes, it and all of its employees had to appreciate diversity more fully.

So, Allstate introduced a companywide training initiative integrated with a value system for its culture. A team of senior leaders was appointed to lead the implementation. The team would integrate the diversity initiative with other major companywide initiatives and it would benchmark with outside companies, establish management accountabilities and measurements, and create a curriculum for managing diver-

## THE SELECTION PROCESS

For the 1996 Best Practice Awards, practices were submitted in these categories:

- ▶ workplace learning and development
- ▶ performance improvement
- ▶ learning technology
- ▶ change management.

In addition, nominators were asked to identify their practices as either "new" or "proven."

All nominations went through a blind review, judged by a panel of

Benchmarking Forum members and experts in training and performance improvement. Awards were presented to the practices that demonstrated clear and measurable results in achieving organizational goals. Citations were presented to practices that haven't yet demonstrated clear and measurable results, but that represent significant contributions. Citation winners are encouraged to seek an Excellence-in-Practice Award in a subsequent year.

sity. The team's strategy covered four primary areas: management accountability, communication, measurement, and education. Companywide accountability was established through performance management that encouraged all 30,000 employees, including managers, to attend diversity education within an 18-month period. The team identified the essential skill areas for making the initiative successful as

- ▶ communication
- ▶ individual responsibility
- ▶ conflict management
- ▶ the leveraging of commonalities.

Standards of behavior for employees were linked with corporate values to reinforce the importance of diversity. Links between diversity education, performance management, and employee development reinforced the significance of the issue of diversity to employees and the company as a whole.

A comprehensive system of measurement ensures that the initiative is monitored to facilitate its success. Diversity courses are evaluated at all four levels of Donald Kirkpatrick's evaluation model, along with 360/peer feedback on employees' diversity behaviors. Employees must pass tests with specified standards. If their scores are unsatisfactory, they are offered coaching to help them attain the required level of achievement.

Another measure is a sophisticated electronic employee-feedback system that evaluates employees'

perceptions on how well the company is meeting customers' expectations. Each quarter, 50 percent of all employees are surveyed, and the results are tracked to assess the initiative's success.

Allstate's four-pronged approach assures that its diversity initiative achieves its goal to make employees aware that diversity is an important element in the company's work environment and customer orientation.

Allstate's practice represents an outstanding implementation approach to achieving a difficult culture change that deals with emotionally charged issues. The comprehensive planning of the implementation and measurement establishes it as an excellent culture-change practice. The links between multiple systems of performance management and training assured that the diversity effort spread throughout Allstate's systems, instead of being an isolated training program. Integrating education and training to achieve performance improvement represents a significant achievement for Allstate in its organizational change efforts.

## California State Automobile Association

### **Best Practice: Improving customer service via an online guide.**

CSAA faced a customer satisfaction problem with its call-in inquiries. Customers were frustrated with how long it took to address requests. At the

**Allstate**<sup>®</sup>

## 1996 BEST PRACTICE CITATION RECIPIENTS

- ▶ Distance Development through Virtual Teaming, Andersen Worldwide
- ▶ Continuous Assessment of Results and Expectations (CARE), Arthur Andersen
- ▶ A Practical Approach to Executive Development, Digital Equipment Corporation
- ▶ Effective Learning Environments: Performance Support in Dynamic Organizations, Digital Equipment Corporation
- ▶ Services Executive & Management Development Process, Digital Equipment Corporation
- ▶ Workforce Capability Planning Tool, Digital Equipment Corporation
- ▶ Iowa Mold-Builder Apprenticeship Program, Iowa Plastics Industry Consortium
- ▶ Cross-Training Rural Teams of Health Professionals, Southwestern Ontario Regional Geriatric Program
- ▶ Mass Market's Virtual University, USWest Communications

time, each CSAA customer service representative was responsible for an area of specialty. That meant that customer requests involving several areas had to be forwarded to different representatives.

In an effort to remedy that situation, CSAA adopted a two-tiered approach—both on and off the job—to reskilling customer service reps. Using self-directed learning with CBT for off-the-job training, reps expanded their knowledge and areas of expertise. CSAA also created an online guide with information on all of its products and services. Using the guide, the reps were able to improve the way they handled phone requests.

The CSAA Online Guide is supported by a content-management and authoring system that creates, publishes, and manages information for the guide. Customer service representatives find the system friendly. Supervisors don't have to answer customers' questions and can focus instead on quality improvement. And the guide's content can be updated frequently to keep information current.

As for the financial benefits, an ROI study indicates conservative projections of a 300 percent return-on-investment over the life of the guide

and authoring system from fewer errors and less rework and transaction time. One study shows that 75 percent of the customer service representatives without CSAA's Online Guide took two to four minutes to access information; 80 percent of the reps with the guide took 30 seconds at most.

CSAA implemented its first version of the Online Guide in a nine-month time frame—pointing to the effectiveness of an electronic performance support system to solve a high-volume, performance-improvement problem quickly.

This award-winning practice achieved its performance goals, redefined CSAA's work flows, and improved communication across the company. It represents an outstanding use of EPSS to meet high-volume training demands in a short time. The criteria that set the practice apart include the comprehensive planning and successful execution of a system for achieving better employee performance.

The content-management and authoring capability made it easier and faster to update the guide's content, and to disseminate information on new products and services. In this example, EPSS is more than a performance support tool; it also serves as a communications system. The strong



measurement and evaluation demonstrate the cost savings and performance improvements achieved with the EPSS.

## Pacific Gas & Electric

**Best Practice: Creating a performance consulting organization from a training department.**



PG&E has been a leader in recognizing and acting on the need for a transition from training to performance consulting. With the uncertainty of looming deregulation in the electric industry, PG&E realized that its power generation department could no longer support the technical training department's budget. To prepare for the changes that would accompany deregulation, PG&E's learning department began "transitioning" the power generation and technical training departments into Technical Learning Services, a new "organization" or unit whose core work process would be performance consulting. The transition began with a benchmarking effort, followed by a design phase of the new unit and new jobs. New and experienced staff members received orientation and training to become performance consultants.

In the transition from a traditional training department to a performance consulting organization, TLS shifted its focus to its customers' business needs and changed its processes to deliver solutions for those needs.

An integral part of the transition was using new approaches. Now, TLS benchmarks itself with external organizations to identify best practices. In addition, a new way to work includes routine front-end analyses to assess the root causes of performance problems. When the solution is training, Technical Learning Services delivers an appropriate intervention using such approaches as CBT, apprenticeship, an employee development inventory, and a leadership skills inventory.

TLS's model has been shared across the company, and performance consulting has expanded into other business units. The experience of Techni-

cal Learning Services indicates that 80 percent of training requests result in a solution other than training. That's convincing evidence for training organizations to use performance consulting. One desired result of the transition was dramatic cost savings—evidenced by a 50 percent staff reduction and a 40 percent budget reduction. In addition, TLS's clients realized a savings-cost ratio of 3:1.

PG&E's practice serves as an innovative model for training organizations that face increasing demands for performance solutions despite shrinking budgets.

Two important aspects that set this practice apart were the well-defined process and philosophy behind the organizational transformation. Those were critical elements to the success of the practice and the broad impact it has had as it has expanded across the company.

## Swiss Bank Corporation & Trans-Cultural Relations

### Best Practice: Creating a selection and development instrument.

In response to the growing globalization of its business, Swiss Bank Corporation formed a partnership with Trans-Cultural Relations to identify and prepare bank employees for international assignments. The partners worked together to create a selection and development instrument, the International Training and Evaluation Seminar. It helps identify employees with the competencies deemed critical for success in international assignments. The instrument assesses whether candidates have the necessary professional, social, and cultural competencies to be effective expatriate employees. The purpose of the instrument was to close the gap between the bank's goal to improve its global business and the current performance standards for expatriate employees.

*ASTD's Excellence in Practice, Volume 1* will be available in October, 1997. It will contain complete case studies of the 1996 best practices. To order, call 703/683-8100.

In the seminar, candidates take part in individual and group exercises with intercultural and international themes. Assessors evaluate their progress on the second day of the two-day event to determine whether to recommend them for international assignments. The reports are given verbally to employees' direct supervisor, line manager, and the responsible HR manager. Reports don't go into employees' personnel files.

The results of that approach include the improved quality of expatriate employees and a high correlation between scores for successful expatriation and coach-rating scores. In the future, expatriate employees will be evaluated during their international assignments and when they return. Additional evaluations will track the development of candidates who were not recommended for expatriation.

This practice stands out as an innovative way to assess the essential competencies of potential expatriate employees and whether they are likely to be successful in international assignments. Considering the high costs associated with sending employees abroad, using a selection instrument can save a company a lot of money. The comprehensive process, from using a selection instrument to communicating feedback to candidates and their managers, sets this practice apart.

The search for best practice is itself a relatively new practice. There are few published criteria or standards that define a best practice. ASTD's Benchmarking Forum is working to establish such standards. The forum

also recognizes the need to identify and honor practices at various stages of development and evaluation. New, innovative practices keep the field fresh and responsive in an environment of changing skill requirements, changing delivery opportunities, and changing expectations for organizational impact.

But it's also important that companies should not rest on their laurels in

## 1997 CALL FOR NOMINATIONS

The awards program of the American Society for Training and Development recognizes individuals, teams, and organizations for enhancing learning and performance while affirming the value of human resources. The awards recognize exemplary practices and the work of practitioners, thought leaders, and researchers around the world. ASTD shares those practices and the work with its members and other professionals in the global community. ASTD awards also honor ASTD members who contribute to advancing the society's goals and vision.

This year, the Best Practice Awards are being made part of ASTD's overall awards program. The new name for the Best Practice Awards is the Excellence-in-Practice Awards. Nominations are also accepted in two other award categories:

- ▶ Advancing Workplace Learning and Performance (given to individuals)
- ▶ Advancing ASTD's Vision (given to individuals or teams).

Nomination packets for the 1997 ASTD Awards are now available. To receive a packet with the criteria, procedures, and forms, call the ASTD Member Services Center at 703/683-8100. Order code: AwardnomP. Completed nominations are due at ASTD by October 1, 1997.

the current fast-paced business climate. ■

*Lisa Lucadamo is project coordinator of the Benchmarking Forum at the American Society for Training and Development, 1640 King Street, Box 1443, Alexandria, VA 22313. Phone 703/683-8154; e-mail llucadamo@astd.org. Scott Cheney is director of ASTD's Benchmarking Forum. Phone 703/683-9206; e-mail scheney@astd.org.*

