Learning Strategies

The MASIE Center

An Open Source eBook

From the Producers of:

LEARNING 2011

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Editor: Nigel Paine

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Learning Strategies

2011 is a unique and critical year for learning organizations!

Learning Strategies is a new, open-source eBook from The MASIE Center, focused on how organizations are clarifying, refining, expanding and updating their strategies to deal with:

- Changing Workplaces
- Changing Workforces
- Changing Business Realities
- Changing Learning Technologies
- Changing Learning Governance
- Changing Assumptions
- Changing Career Paths
- Changing Competency & Talent Models
- Changing Agility

This eBook will give you diverse perspectives on ways in which organizations are approaching these changes and the ways in which they are refining, articulating and implementing evolving Learning Strategies.

The MASIE Center regularly releases eBooks to provoke discussion within the learning field around key issues. Special thanks to Nigel Paine, Bob Baker, Meghan Cernera, Lauren Boughton and Brooke Thomas-Record for their work on this project, along with our Learning CONSORTIUM member organizations.

Yours in learning,

Elliott Masie
Chair, The Learning CONSORTIUM
CEO, The MASIE Center

Publisher: The MASIE Center, Elliott Masie, CEO

Editor: Nigel Paine, MASIE Learning Fellow

MASIE Center CLO: Bob Baker

Reseacher: Meghan Cernera

Designer: Lauren Boughton

CONSORTIUM Manager: Brooke Thomas-Record

What Makes a Successful Learning Strategy?

Nigel Paine, MASIE Learning Fellow

There is a wonderful and brief article in *Fast Company* magazine written in May 2011 by Gadi Amit called "How Can You Strategize For The Future, When You Can't See Beyond 18 Months?" This is a very good question and one that certainly needs to be asked. If the future is more than uncertain -- verging on the downright unpredictable -- and bad guesses are expensive in every sense, then why bother to plan for the future? If you cannot plan it, then why produce any kind of strategy? And if you cannot develop a strategy, then why bother to write anything down?

If this is a commonly held perspective on broad-brush company and organizational change, then why would a learning and development department compound uncertainty onto speculation at one degree removed from the business cutting edge? The result will surely be irrelevant at the very best and downright dangerous at the worst. What are the chances that your predictions will align with those of the company and match reality? Almost zero, you might argue. So, again, there's the question: why bother?

The purpose of this chapter is to answer that question in not one, but a myriad of different ways. In spite of uncertainty, complexity and ambiguity, learning strategies are thriving and here, in these next few pages, is why!

Why bother?

The alternative to developing a strategy would be simply to take change as it comes and deal with contingency at the appropriate moment. That would seem to be the message implied in the article title above but, actually, Amit has other ideas:

We need to redefine the parameters of the future in order to build greater trust in our work. I believe the future is only 18 months away. Beyond that, it's anybody's guess. And if you accept my definition of the future, design has plenty of highly effective ways of shaping it.

Amit is a design engineer and President of NewDealDesign LLC, but his logic has far-reaching implications and applies equally to business. In taking the right perspective and time frame, you can richly and productively strategize, and in theorizing about the future, you may well be able to build that future - or at least plan for some of the possibilities coming your way.

You will find the answer to Amit's question everywhere in this book. The next nine chapters, written by people in the front line of learning at organizations big and small, introduce challenging and contradictory views, yet they all contain one overwhelming message: building a learning strategy is a living and rewarding process, and one you should engage in. You should do so with a balance of realism and caution while striving to align with the objectives of your organization.

Each chapter demonstrates what learning contributes to the organization's success as a whole. Each embodies learning at the heart of an organization: not learning that is self-contained and isolated. This book will undoubtedly expose every reader to new insights, a fresh approach and might even reveal pathways into the 'C' suite.

Case Studies

The case studies in this book begin from different starting points and take different perspectives but all are structured within a consistent framework. Simply put, this compilation is a lens to view a learning strategy as something important and relevant that helps shape, structure and develop a learning operation, all while acting as its structuring spine.

Bob Baker, into his fourth Learning Strategy at the CIA, has watched the strategies evolve over a fifteen year period. The first three were useful and of their time, but were 'primarily focused on the operation of the learning enterprise.' They concentrated the minds of the senior management on learning for a brief period and established the framework and structure to take the learning operation into its next phase. This underpinned the entire evolution of learning in the Agency from a conventional classroom-based process into a nascent corporate university. All this was critical, and the process was useful and worked well; however, his fourth learning strategy is a quantum leap forward and is quite unlike the other three.

The aim now is to 'drive learning deeper into our Agency' by linking learning very closely to the mission of the organization. This means focusing on moving learning much closer to the learner, wherever he or she is located, and whatever the role being undertaken. The aim is no longer about how to run a learning enterprise or what shape the learning enterprise will take, but rather figuring out what an organization with learning at its core might look like. The fundamental elements of the new strategy are:

- *Setting a learning context* and taking stock of the future. The learning strategy defines four key learning trends: learning will become increasingly mobile, social, available in multiple formats and accessible on demand. These are then aligned to the changing workforce and changing workforce needs, focusing on the benefits that these trends can bring in terms of meeting those workforce needs.

The team then established the disrupters that will impact the learning strategy and how to cope with those: significant world events, changes in mission priority and changes in technology. Establishing these was both a thinking process - learning under the pressure of organizational change - and an action process: "how will we respond if these disrupters change what we need to do?"

- *Building a case for change* by establishing the four key principles of the new strategy - commitment, people-performance, access and agility - and ensuring that these four principles are tied into the three pillars of the agency mission so that there is 100% alignment at all times.
- *Making the learning strategy come to life* across the whole organization. This involved a SWOT analysis (strengths, weaknesses, opportunities and threats) of learning and, from that, the team built an Agency-wide learning vision and mission.

To achieve the vision that 'learning drives what we do to meet the Agency's mission,' learning has to be accessible, innovative, tied directly to work, comprehensive, outcome-focused and connected. These are simple but revolutionary words that impact the learning team's thinking.

Finally, the strategy defines ten initiatives that serve as targets and outlines the parameters for achievement of those ten initiatives, which then become the benchmarks and the indicators of progress for the strategy. The bottom line for the Agency was set out clearly and simply: 'we cannot excel as an organization without a very strong and effective learning enterprise.' The starting point where learning had to be embedded into the Agency's mission now becomes the finishing point with learning existing at the heart of the Agency and its work program.

Lisa Pedrogo's approach was somewhat different. Lisa works for a private sector organization: CNN. This too is a fast-moving, rapidly-evolving, 24-hour operation. Whereas the CIA gathers and processes information rapidly from all over the globe, CNN deals with global news and delivers news programs globally. As Lisa says, 'time and speed to air are major undercurrents in our business.' And speed to air is not just about collecting the news and developing the news package: it is also about transmitting the package and understanding the technical issues around delivery. CNN demands that its output is accurate and first, whenever and wherever in the world the news breaks! CNN has to deliver on this promise every single day of the year!

Lisa's major challenges are to make the learning function stay relevant and add value to a business that is always short of time and where pressure to get the story and transmit it leaves little room for formal learning. In addition, her team has to find a way of adding to the capability of the organization in a timely and cost effective way. The role of the learning strategy is abundantly clear: it is an aid to developing ideas and targets that serve as a baseline framework for how and what learning is delivered. It also ties in the underpinning philosophy around the relationship between CNN and its learning operation.

Each January, the learning strategy is built using a structured process:

- Review the successes and failures from last year
- Define what needs to be accomplished this next year, which is part visioning and part needs analysis

- Develop an action plan that will be measurable and also set clear goals

For Lisa, the strategy is one of the ways she builds a performing learning team whose members work together, learn together and operate within a single and inclusive vision. They have a common framework for judging how well they have done. The organization demands no less. CNN is a very agile organization, which means that learning must be agile to remain relevant; therefore, the plan is followed but within the context of changing learning needs throughout the year. Lisa discusses blitz practices, responding quickly to emerging needs and delivering new skills and approaches in small, intensive chunks of work. These are perhaps off-plan deliveries, but definitely at the heart of what CNN needs. So, like Bob Baker in the CIA, CNN's learning team needs to respond to disrupters and have a process for dealing with disruption and reallocating resources when necessary.

Ruben Bonales, previously in charge of training at Waste Management, had a very different challenge. He had to make the case for a learning function before he could prove that a strategy was necessary. So, he started with a thorough needs assessment of the business. This allowed him to immerse himself in the business processes and make his own judgments about where learning could best support business goals. The assessment was a time consuming endeavor, but also a vital undertaking to begin the alignment process. From this starting point, he traces for us a three year journey, based on the ultimate question of what skills and behaviors the staff need to deliver the organizational goals.

Coming from a position of zero investment in skills development, this initial analysis was relatively easy. Basically, poor hiring led to large skills gaps that were not being closed; yet this was not easy to remedy since Ruben began this journey during a punishing budget cutting environment. He knew he had to find a way to use it to his advantage. By targeting Fleet Management for a new training program, he was able to cut costs per driver per hour by $0.28, set against the non-participant control group which managed only $0.03 savings. He realized that high overheads came from poor execution, generated by poor skills and misunderstood expectations of required behaviors. The training investment yielded over nine times the productivity gains and paid for the program many times over.

Ruben was on his way to building validity, accountability and tangibility in the eyes of the organization for his learning operation. He worked hard to build the business relationships to keep that seat at the table. His tactic was to become a trusted advisor and strategic partner to the critical members of the senior management team. He would not merely do what they told him to do but would engage in a dialogue around what the business required and push for a mutual agreement. This built trust, credibility and, above all, accountability. The roll-outs of new programs would speak for themselves.

One program led to a 21% increase in customer engagement scores. Ruben rode the roller coaster of change in the organization in a positive and business-focused way. His ultimate bottom line was always business results. He used them as his fundamental metrics and that in and of itself sustained his dialogue with the business. So the route chosen to develop and present a strategy to the highest board in the company was based on three clear targets:

- Developing alignment to organizational goals
- Building a strong relationship with the business
- A focus on delivering tangible business results

Willem Manders of Shell would endorse the main thrust of Ruben's development journey, but the context of each organization is quite different. Royal Dutch Shell is an energy company with over 93,000 employees, working in 90 countries around the world. It extracts oil and gas and refines, supplies and trades those products to consumers and industrial customers. Shell also invests massively into research for new products and technology solutions. The learning organization mirrors the business, in so far as each business and function has a VP of Learning and Organizational Effectiveness, plus there is a small central team for Enterprise Learning headed by an executive VP for Learning, Organizational Effectiveness and Diversity & Inclusion.

Shell's strategy has two parts. The first lists the key focus areas for learning in the short-, medium- and long-term. The second hinges on functional excellence or delivering learning in an efficient and effective way. They come together in the process of defining the key stakeholders and their required capabilities, working out the learning blend and then determining the most efficient and effective way of delivering learning interventions. With part one, business results involve constant dialogue with all the learning managers from the global businesses. Part two emerges from a bi-annual benchmarking exercise using qualitative and quantitative data to identify best practices outside the company. This is based around identifying innovative processes, structure and governance, information systems, people and culture.

The structural link between learning and organizational effectiveness allows a wider perspective to be taken and a wider range of interventions developed in both a formal and informal sense. This enhances the impact of learning in Shell.

Keith Dunbar in the Defense Intelligence Agency has a similar perspective. His role is to align learning tightly to 'the priorities, culture and future direction of the business,' in the words of Donna MacNamara, the former VP of Global Education and Training at Colgate Palmolive. In DIA's terms, it is about getting the right people in with the right skills and attitudes to deliver the mission in a world that is increasingly volatile, uncertain, complex and ambiguous. This means developing a plan that is both agile and adaptable.

The need for this emerged from an important restructure in 2006 that created an Office of Learning and Career Development. The expressed aim was to shift the learning delivery culture from one of classroom execution, based on supply, to a focus on learning and workshop performance, based on need. This was a first for the organization. There were four critical lessons in delivering that process.

- *First:* get the right people together to develop the strategy. Keith recommends that you should be selective and prescriptive in gathering this team together, and they need to commit for the entire process of both development and execution. The 30/30 rule can help generate an idea-rich and unfettered group. That is, 30% of the team should be under 30.

- *Second:* ensure customer engagement by asking the right questions that help you understand the context in which the learning strategy has to operate. And these questions should focus on what the emerging issues are as well as what exists now.

- *Third:* select learning strategy metrics. This concerns defining the right data to collect rather than simply collecting the data that appears to be most easily available. Keith's focus was on gathering data that helps tell the story of the impact of the learning strategy in quantitative terms without over-measuring. This requires rigorous selection and an eye on what can be practically handled by the team.

- *Fourth:* 'sell' the strategy by delivering sessions with the whole senior management team. This kept the divisional strategies on track and allowed for a focus on eliminating common barriers to develop. Keith lists 14 potential barriers that were recently outlined by the University of Pennsylvania CLO Program students. Not all occur all of the time, but the list is a useful check against your own process for developing a learning strategy.

Eaton is a diversified power management company operating globally. **Terry Farmer and Evan Ishida** take us through the process of developing a strategic learning portfolio (SLP) to support and drive learning in Eaton. The SLP represents a wide variety of learning opportunities to improve business performance through a continuous and multidimensional process, including both formal and informal routes to competence. The SLP is set at three levels: instruction (for novices, mostly and 20% of output), ideas and collaboration (needed mostly by competent performers, and 60% of output) and innovation (mostly needed by experts, and 20% of output). Each of these three areas is divided into informal and formal learning.

The SLP, like all the other strategies discussed in this book, begins with a clear understanding of business strategy, and this involves building strong relationships with the business-facing senior executives. If you can do this, then it means the business executives will help determine priorities and guide the setting of targets. This is a learning solution and it is important to focus on those areas where a learning solution is going to work. Clarity is critical for a focused and concentrated approach to building the learning strategy. Moreover, the approach must be set against the current realities of the work environment so that what is offered is realistic and appropriate for the purpose it was intended. In this current climate, there is no room for extraneous delivery of materials or fuzzy targeting.

All of this adds up to a simple process for determining the appropriate learning solutions for a particular need. The decisions are based on an acute understanding of business strategy and goals, the critical work areas (CWAs), critical competencies for key roles and knowledge of the existing level of competence. The simple process should deliver appropriate learning solutions that will enhance business goals and must be renewed on an annual basis to ensure relevance and consistency.

There could not be more contrast between the Eaton approach and that of Farmers Insurance. But the ultimate aim of both organizations' learning strategy is to develop staff to deliver business goals. **Mike Cuffe** at Farmers shows how the focus of their learning strategy is very much on technology and building a values-based and performance-driven operation, centered around Farmers University or the 'U' as it is known. It has a physical campus in the Agoura Hills, California, but it serves the learning needs of all the Claims teams anywhere and everywhere they are located. Farmers' intention is to drive learning throughout the organization by maximizing the learning opportunities for staff. This is accomplished through exploiting the potential of technology to deliver information anywhere and at any time.

The panoply of technology at the service of the U is both focused upon what technology can provide internally to drive the campus-based learning and what technology the staff has at its fingertips to make the U a connected center for learning everywhere. The latter use, for example, is taking a hard look at the potential of smart phones and iPads. The central team develops multimedia 'learning nuggets,' which can be accessed at any time using any portable device that an officer has at his or her disposal. The 'U' has an overriding philosophy to enable rather than constrain. The essence of the strategy is therefore to deliver as much as possible on demand, but also have the capability, through video classrooms and video conferencing, to reach out to large groups at short notice to deliver a fast message to a lot of people quickly (such as in response to natural disasters).

The philosophy of learning is based on three objectives: getting learning needs established, measuring learning impact and delivering efficiently at all times. These are pursued with a careful eye on the bottom line. The 'U''s function is to boost the standing and effectiveness of the company to help it compete in a tough U.S. market. Learning is at the heart of the company's ability to mobilize quickly and speak with a common voice of authority.

The case studies finish with a banking example. Usually you would expect a rather conservative approach from bankers, but the current climate coupled with recent history belies that myth. **Peter Hallard** from Lloyds Bank in the UK is quite forthright: 'learning leaders who devote their time to the development of detailed learning strategies are destined to a lifetime of disappointment.' He passionately defends the need for a learning strategy but debunks the traditional approach. In a volatile environment, complexity and slow analytical approaches are out. In place is a process that is based on insight - not planning - and that insight comes from knowing the business and being expert and confident enough to interpret business issues and postulate a learning solution. The learning leader sits as an expert with business facing peers and attempts to negotiate something innovative and comprehensive in scope that works quickly.

By using sophisticated customer needs analysis, companies can know what customers want before the customers do! Peter thinks that a learning leader has to have the same kind of data at his or her fingertips and have the same kind of prescience. In other words, the learning leader has to have analyzed the trends in the business and the need for new competencies in the workforce and worked out possible solutions before anyone else. This is learning by leading rather than responding to requests. By the time of request, Peter would argue, it is too late. He believes in sharpening insights and intuition to deliver with agility and confidence. He sees a world where the learning leader does not negotiate a program with the business; rather, he or she tells the business what it has to have in order to succeed.

Out go learning catalogues along with complex, structured programs. In come short, flexible, informal and formal offerings. These are delivered quickly through a framework that is responsive and flexible. Another huge implication of this approach is that the learning staff has to engage with customers directly in order to understand what customers expect of the bank staff and then deliver the staff with the abilities and attitude to meet the customer's expectations. As a professional, you have to understand learning and own the learning strategy, but you also need a profound knowledge of the business. You stake your reputation not on staff liking what is being offered, but on the impact it makes on the business bottom line. It is about mutual respect and mutual trust backed up with delivery.

In many ways, Peter sums up the thrust of so many of the other chapters. This is a new age with unprecedented change and volatility. The new learning leader has to step forward to deliver in this environment if he or she is to add value and make a sustainable and significant contribution to the ongoing success of the organization.

Perhaps the old methods of planning are gone and the future is far from visible, but modern learning strategies are no less demanding. Now, they may be even more focused and strategic. Further, each chapter reveals that a learning strategy is neither an academic exercise nor a "box ticking" process. It is not abstract and unaligned or irrelevant and unusable. It is truly a device for building the future; a means of engaging your whole team in the process and defining what you can do for your organization in terms that everyone will understand. A learning strategy is both a statement of commitment and a testimony to engagement. There are no models but there *are* consistent themes and approaches that work.

In many ways, the concluding chapter, an interview with Elliott Masie, endorses the themes and the approaches in the book. Elliott sees a good learning strategy as the GPS that maps out how the investment in learning will contribute to the overall success of the organization. As such, the strategy is a vital component of a successful learning operation. "Ultimately," he says, "I don't know how you really lead an organization in learning without a current, rich, and affirmed learning strategy." And that is a sentiment that runs strongly throughout the book. If you read this and are still unconvinced, then we have failed in our basic aims!

So what are Elliott's fundamental principles that hold in strategy after strategy in public and private sector organizations all over the world? They hinge on four critical points;

- A learning strategy requires a complex process of deep thinking about the role of learning, and it should end up a solid 'document' to be used and referred to long after it has been created.

- It is about affordances: what a new or existing technology can do for learning. You drive by what you can achieve: not what looks good, new or trendy. In that way, you achieve a balance between the existing and the new. A learning strategy develops the learning culture within the organization that helps make those judgment calls.
- It is oriented toward action and requires visible outcomes; these truly have to be endorsed by senior managers. But it is not an Action Plan; this may come from the Strategy but it is not a substitute for a strategy.
- Finally, this is not something you can buy off the shelf, hand over to consultants, or copy from some other place! You would be skipping the alignment and the buy-in, both of which are critical for a Strategy's success.

Ultimately, Elliott emphasizes that a learning strategy is about innovation; it calls for a deep look at what we do and how we can do it better. There is no greater justification than this for developing one in your workplace.

If you are about to embark on the development of a learning strategy or want to use a simple framework to evaluate your strategy, then use this checklist and ask yourself:

Is my team's learning strategy:

- deeply embedded in the organization?
- focused on tangible business goals?
- an opportunity to radically realign learning?

Does it:

- convey a single, inclusive vision?
- demonstrate engagement with the CEO and senior leadership?
- define the key stakeholders?
- define a structured process of data gathering and decision making?
- establish a common framework for judging the impact of the learning input?
- paint the big picture rather than focus narrowly on learning?
- avoid fuzzy logic and poor targeting?
- embody a spirit of wide consultation and openness?

Is it:

- based on tangible and measurable initiatives?
- coherent but exciting?
- agile and adaptable?
- clear where it aligns with personal and organizational effectiveness?
- exciting and easy for non-learning specialists to read and grasp immediately?
- technology rich and multi-platform in aspiration?
- full of the possibilities of informal learning to enrich and extend the learning process?

And above all, does it embody an ambitious but realistic vision of what learning can deliver in your organization?

Why Develop a Learning Strategy?

1. It shows the whole organization what you can contribute to its overall success.
2. It galvanizes your staff and gets them all thinking the same way and pointing in the same direction.
3. It helps you prioritize and focus on what is really important.
4. It gives you a benchmark to judge your performance against year after year.
5. It demonstrates clear alignment with the objectives and aspirations of your employer.
6. It is the basis for good conversations with the key executives about learning.
7. It ensures shared accountability for the outcomes between you and your team and the operational heads.

What you should discuss with your learning team and the rest of the organization before you begin to write a strategy:

1. What the scope of the strategy is.
2. What each of your team members will contribute to the development of the strategy.
3. The ways in which it is aligned with the business strategy.
4. Who it is aimed at and how it will be disseminated.
5. Who will sign off and sponsor the strategy.

Things you MUST include:

1. What your contribution to the overall success of the organization will be.
2. Firm figures and firm outcomes.
3. The bigger picture rather than just the details.
4. How you will judge the strategy a success.
5. Its currency.

Things you MUST avoid:

1. Jargon, especially learning jargon.
2. Big gestures and big statements that are devoid of facts or figures.
3. Claiming too much.
4. Too much detail so the wood is lost for the trees.
5. Making it a solo effort; this is teamwork!

Nigel Paine, MASIE Learning Fellow

Nigel Paine, a MASIE Learning Fellow since 2006, speaks at conferences around the world, writes for a range of international publications and coaches senior executives in companies in Europe, Australia and the USA. He is currently Managing Director, nigelpaine.com ltd., a company that focuses on promoting creativity, innovation and learning and the link between them. Prior to starting this company, he led the BBC's Learning and Development operation from 2002 to 2006 where he built one of the most successful learning and development operations in the UK. This included award winning Leadership program, state of the art informal learning and knowledge sharing and one of the most successful and well-used intranets in the Corporate sector.

CIA’s Learning Strategy: Focusing Out on the Organization We Serve

A Strategy Perspective from the Central Intelligence Agency

Bob Baker

Framing the Learning Way Ahead: The Learning Leader’s Perspective

As an experienced leader in the CIA’s learning enterprise, this is now the fourth “learning strategy” that I have helped to develop. It will impact CIA University’s core functions and member schools, as well as a number of learning units scattered throughout that are not affiliated with CIAU (CIA University).

Our three previous strategies marked the transformations in the learning enterprise that have occurred over the last fifteen years. We began with traditional, classroom-based corporate training, which moved to fee-for-service in order to provide learning opportunities for those who could pay. Finally, we evolved into a loosely confederated “university.” All three of those strategies shared the common characteristic of being primarily focused on the operation of the learning enterprise.

Although they fell short of fully creating the desired impact, they did indeed result in change that we are able to leverage going forward, including:

- More focus among Agency senior leaders on using learning to improve organizational effectiveness and on making learning available globally: not just in local classrooms.
- Increased credibility with “customers” as the quality of our learning products improved, meaning CIAU now offers something of value.
- Greater interest among the professional educator workforce in trying and adopting learning that leverages technology.
- Emerging collaboration among the senior managers of each member school.

So, as we began the fourth and current learning strategy, we asked, "What will be different this time?" We concluded that we could gain a great deal by developing a new learning strategy aimed at driving the positive impact of continuous learning deeper into our Agency. The key benefits would come from tying learning more closely to our mission. We recognized that the time our workforce has to respond to multiple new intelligence problems has become substantially compressed, especially since 9/11; our workforce must learn more quickly than ever before. We wanted to focus on moving learning closer to the learner, rather than on how to run a learning enterprise better, and this strategy would be our best way to achieve the desired impact.

Then we asked, "What are the most important things we must do to develop and implement such a strategy successfully?" We decided that our learning strategy would:

- Use a sound strategic planning framework to include: assessing the current context for learning, making a compelling case for change, developing a sound and bold vision with big but attainable goals, and ultimately, being highly actionable.
- Provide an opportunity to forge a closer relationship among the leaders of the various and decentralized learning units that make up the learning enterprise
- Increase the availability of content and then deliver it in multiple ways.
- Focus on the emerging and rapidly developing opportunities to provide learning at the point of need - going beyond our Washington-centric classroom delivery model.

This chapter highlights the process that we then used to develop our new strategy, which is almost ready to be rolled out. As such, our intent is to share what we have found in order to support others who are in the process of developing and implementing their own strategies.

Learning Context: Taking Stock of the Future

We began with an "environment scan" that we called our "Learning Context Map." As implied by the name, we first looked at the context in which we would develop and roll out our strategy. We started by taking stock of external trends related to learning that should have the greatest influence on our strategy. Based on a literature scan, engagement with colleagues throughout the learning community and deep dives with experts in the learning field, we settled on four key trends.

Learning is becoming more:

- *Mobile.* Geographic proximity does not matter for access to content and tools (e.g. mobile apps and hand-held computing).
- *Social.* Social media is having a substantial impact on the way we interact (e.g. Facebook and Twitter).
- *Learning-style friendly.* Content is available in different forms (e.g. You Tube and Podcasts).
- *Accessible and on-demand* (e.g. "Google it" and blogs).

We also looked internally at the pressing needs of our workforce, which requires learning that:

- Provides relevance and impact for the increasing diversity in mission/job requirements.
- Does not depend on taking classes "when and where they are available."
- Enables greater informal learning through networking with experts.
- Helps learners understand where their learning gaps are so they can best focus their learning efforts.
- Captures in a consistent and useful way the experience and knowledge resident in our workforce.

Finally, we examined the most significant uncertainties under which a learning strategy must be able to operate. We identified three potential disrupters that we should plan for:

- *Significant world events.* Major world events require rapid shifts in knowledge and expertise.
- *Changes in mission priorities.* We operate in a national security context with rapidly changing areas of emphasis.
- *Changing technology, i.e. means of delivering learning.* Our capacity to deliver learning is increased by technology. We must keep up with change and be effective at assimilating and effectively adopting it where appropriate.

We saw these as reinforcing the needs that we identified above.

The Case for Change: The Four Principles of our New Strategy

Any successful change effort starts with a clearly stated case for the change. Our approach was first to establish the principles of change, the efficacy of which would be clearly evident. Driven by what we learned in our environmental scan and through the Director's own Agency strategy, we worked primarily with the leaders of the various schools that make up CIAU to conclude that our learning strategy should be founded on four principles:

- *Commitment.* The value of learning is evident and embedded in our organizational priorities, management practices, support functions and approaches to improving employee engagement.
- *People-Performance.* Our workforce is provided with worthwhile, engaging and efficient learning opportunities that truly support career-long development: not just periodic events.
- *Access.* Our workforce is able to benefit at the moment of need from the learning opportunities and resources that give them an edge to excel at their work.
- *Agility.* Our workforce participates in timely and cost efficient learning experiences for improving individual performance.

In reviewing our four principles for alignment to our Director's Strategy for the CIA, which is comprised of three pillars, we found that Commitment and Performance tied to *Pillar 1 (Invest in our People)*, while Access tied to *Pillar 2 (Leverage Technology)* and Agility tied to *Pillar 3 (Enhance Global Agility)*.

Assessing the Opportunity to Make the Learning Strategy Impactful

Our next challenge was to determine what we should focus on to bring the strategy to life! To do this, we developed a Strengths-Weaknesses-Opportunities-Threats (SWOT) Analysis. The *Strengths* and *Weaknesses* served as an assessment of the learning enterprise's ability to enable an Agency-wide strategy. The *Opportunities* and *Threats* helped us to see future and external factors that would impact our success. Here are our findings, briefly summarized:

- *Strengths.* To our delight, we found that our previous and more internally focused strategy provided some great strengths that we could leverage. Specifically, over the past few years, customers have increasingly seen the positive impact of our products and want more. Our staff has grown in expertise, skill and capacity. Collaboration and shared decision making have dramatically increased across previously stove-piped schools in CIAU. And, our staff is highly motivated.

- *Weaknesses.* We found several areas for improvement. Most notably, we needed to develop deeper consulting and performance improvement skills in order to better anticipate future learning needs. We also needed to use consistent standards for design, development, delivery and access to learning across the entire enterprise to improve the learner experience.

- *Opportunities.* We saw many opportunities: to leverage closer ties between schools in order to share and co-develop best new practices; to develop more effective measures of learning outcomes for individual and organizational assessment of gaps; to partner with IT and HR professionals to build a stronger – and more global – learning infrastructure; and to leverage developing communities of practice in developing learning opportunities.

- *Threats.* We clearly had to overcome several threats, including our inability to easily connect learners for less formal learning, resistance to change and limitations in our technology infrastructure.

Creating an Agency-Wide Learning Vision

We all know that a Mission and Vision Statement can either be something that hangs on the wall and is given little attention or it can be a powerful driver for impact! As the learning leadership team, our desire was that when "customers" described their learning experiences, they would use the words we had used to frame the vision or describe it in ways similar to our mission statement.

We determined that "the mission of learning" in our Agency is:

To equip the CIA workforce with the shared values, commitment to our mission, knowledge, and excellence in intelligence tradecraft and leadership needed to accomplish extraordinary tasks in the service of our nation.

Note: the last phrase ties to the Agency's mission statement for alignment.

As for vision, we determined that: *"Learning drives what we do to meet the Agency's mission."* To do so, learning must have a number of qualities and be:

- Accessible
- Innovative
- Tied directly to our work
- Comprehensive
- Outcome-focused
- Connected (within people and content networks)

Making it Real: Initiatives to Bring the Strategy to Life

The journey of any strategic planning process ultimately ends with two key questions, the first being, "What do we do to successfully bring the strategy to life? What initiatives do we undertake?" From past learning strategies, we have learned that the initiatives we develop must be:

- Tightly aligned to the principles, which are in turn aligned to the organization's goals.
- Compelling for the "customers" so they begin to see a positive impact in their world.
- Staged over time. By breaking our initiatives into sequential steps, we are better able to define and meet milestones for implementation.

- Shared across the entire learning enterprise. In our case, we found that engagement implementation by all of our schools – and in most cases, multiple schools – leads to more success.

For our new learning strategy, we are looking at ten initiatives as tied to the four principles:

Principle	Initiative
Commitment	• Integrate new learning approaches – including informal learning, collaborative learning, user-developed content, virtual worlds and simulations – to capitalize on their emerging learning affordances. • Create alignment among the various parts of the learning enterprise on use of new learning approaches to create efficiencies, leverage/share resources, develop and use best practices and reduce redundancies. • Coordinate and standardize support functions (like receiving credit for learning), work/delivery processes and infrastructure to align to an end-to-end learning cycle and life-long learning.
People-Performance	• Track learning impact by developing and using outcome-focused performance measures in the workplace. • Create a staff or learning professional skill set beyond traditional classroom-based education, including skills in consulting, performance improvement, learning innovations and informal/experimental learning.
Access	• Provide content and learning opportunities that can be easily searched, discovered, shared, enriched and interactive. • Develop enterprise-wide systems and learning infrastructure to support end-to-end learning activities for all Agency employees. • Establish a virtual learning environment.
Agility	• Create a connected learning network of people and knowledge repositories that provide timeline and relevant information at the point of need. • Locate learning professionals into field/customer spaces.

From this point, we are identifying the first steps in the staging. For example, as a first step for our “Access” initiative of developing enterprise-wide systems and learning infrastructure, we have established a working group comprised of staff members from each school to make decisions on the specific systems we will use for online courses, a social learning network, content repositories, etc. In doing so, we are developing the governance processes to build out and maintain an infrastructure that meets our needs and also a multi-year budget plan to acquire and maintain those systems.

Assessing Our Impact: Measuring Our Success

The other question on the strategic planning journey is, "How will we know if we are successful with our learning strategy?" To know this, we felt that we needed to be able to answer two other questions. The first is, "How will we know if the learners are learning 'better'?" To help answer this question, we have developed our learning strategy "success factors." Since success is ultimately in the eyes of the learner, we developed them from the learner's perspective.

If we are successful, our learners will say, "I…

- … have all of the information and expertise I need at my disposal."
- … am able to make use of what I have learned on the job."
- … have been provided learning that meets my career and developmental needs."
- … have managers that recognize the value of learning and the time spent on it."
- … have access to expertise when and where I need it."
- ... benefitted from learning outside the classroom."
- … used learning technologies that meet my expectations."
- … am better prepared to perform in an often ambiguous and uncertain world."

The other question is, "How will we know if the initiatives themselves are having an impact?" To answer this question, we developed some targets that we are developing metrics for:

Principle	Initiative
Commitment	• Percentage of learning products offered by the learning enterprise that use new approaches to learning • Percentage of CIAU schools and other units providing learning products that are part of each learning strategy initiative • Percentage of Agency organizations that support the new learning strategy
People-Performance	• Percentage of learning professional workforce with skills aligned to developing innovative learning products that bring learning closer to our learners • Percentage of learners who have shown improved performance in the workplace
Assess	• Number of technology-based solutions to support end-to-end learning • Percentage of satisfied learners • Percentage of learners participating in newly developed learning opportunities
Agility	• Number of learners connected through social or virtual networks • Number of new networking and knowledge sharing opportunities for learners

We are currently developing the metrics and means of collecting data to assess progress on these targets. In some cases, data is already available from existing Agency-sponsored employee satisfaction and engagement surveys. We will also have the opportunity to partner with our IT and HR colleagues to "piggy-back" on data collection activities in which they are engaged.

A Brave New World Ahead!

It is an exciting time for learning and for learning professionals. We at the CIA share that excitement! With this engagement, however, comes the growing recognition that we cannot continue to excel as an organization without a very strong and effective learning enterprise. Our challenge is to marry the growing affordances of new learning approaches, and to do so at a pace equal to the growing needs and expectations of learners. Clearly, a well-developed and fully implemented strategy will take us a long way toward that goal.

Bob Baker, CIA

Bob Baker now works as The Learning CONSORTIUM's Chief Learning Officer *and* was previously the Deputy Chief Learning Officer at the Central Intelligence Agency. He had spent nearly two decades of his 31-year Agency career in the learning field as an instructor, learning manager and corporate leader. His work focused on learning related to leadership development, instructor development, intelligence related substantive issues, employee onboarding and the learning strategy. He is known as an innovative leader who has successfully delivered on multiple initiatives to advance learning impact in the CIA. Prior to his work as a learning leader, he served as an analyst and manager in the CIA's analytic function.

The Strategy of Managing Change

A Strategy Perspective from CNN

Lisa Pedrogo

As a learning leader supporting broadcast journalists, I am acutely aware of time. Everything in our business today ticks by in seconds. This is a true statement for any organization, but especially for mine: a live, television news environment. Time and speed to air are major undercurrents in CNN that drive forces in our technology infrastructure, design, deployment and training.

In the news business, breaking a story means you got it first. How well our journalists execute this task is directly proportional to how much they know: about the story, about our processes and about the tools to get that story to our operating platforms. Competition is fierce to be best and first. And now, that competition includes any provider of information content via the Internet, which can be watched on just about any wireless device. “Citizen Journalists” are everywhere. Their ability to record and share video and information effortlessly and quickly provides instant access to alternative points of view about events in our world. Ironically, educators today are competing with the same forces, especially the Internet. Our employees consume information the same way everyone else does, and those behaviors follow them into the office.

You can learn how to do just about anything online, by searching for it or by messaging your closest 10,000 Facebook friends about what they know. Whether or not the information is useful or accurate is a gamble, but each time it proves to be correct or helpful, you validate it. If you can learn what you need to in ten minutes or less, you win. This is why our toughest competition as learning designers and educators is the Internet portal. It is always available, searchable and extremely cost effective. I have yet to discover a training team that can say the same. When combined with a longer work day, a manager’s desire to avoid sending someone to training because of coverage concerns and a boring curriculum, you have the perfect storm in a poor business climate to eliminate a training group.

So, the challenges are:

- How do you stay relevant and add value to your business so that people choose your team over the Internet?
- How do you keep your curriculums fresh with few resources that cannot possibly cover the entire footprint of your company around the clock?
- How do you avoid overloading your already stressed clients with too much information, but still ensure they are positioned to succeed in using critical business tools?

From a learning leader perspective:

- Can you manage change that today's businesses demand from their education teams? From a skill set perspective? From a leadership perspective?
- Are you willing to try new things in order to make it happen?
- Is it possible to do more with less, or to have more impact without additional resources?

Building Relevance. In my experience, it boils down to strategy and leadership. Specifically, it is about developing a strategy that can handle immediate, relentless change without sacrificing quality of learning experiences or burning out your team. This requires managers to lead their teams through constant change by eliminating barriers to success, spotting pitfalls and roadblocks before the team encounters them, and gaining the support and backing of senior executives and clients throughout the process. Learning managers who effectively meet this challenge are leading change and helping to transform their companies. The ability to manage change is a key driver for business sustainability and growth, both of which are highly marketable and valued in the C-suite.

Today's learning environments must consider this in their training implementations, because the facts are:

- Our business are global
- Our workforce is lean.
- Our costs impact our clients.
- Our students are under an inordinate amount of pressure to deliver results- quickly.
- Our results must be attainable, sustainable and measurable.

The ability to adapt and deliver results in a timely manner is the beginning and the end of the education cycle. Time is money. Agility matters. To do this successfully requires a process that includes: collecting constant feedback from customers, students and teachers; digesting and integrating change into curriculums quickly; and delivering knowledge when, where and how people want it. Developing a strategy that accommodates unplanned change with little notice and fast execution requires discipline, attention, awareness and practice. It also requires complete trust in your team.

Running a learning organization is like running a business inside of your company, complete with strategies, processes, measurement and analysis around successes and failures. Your approach should tie directly into the corporate culture, values and goals, aligning with your overall company strategy. In the simplest business terms, this means allocating resources and effort where they have maximum impact for the broadest audiences without overkill. It means lean training and a variety of information transfer approaches. It means handling many projects at one time and building leaders within your team who can help manage the work and the relationships required to succeed.

Although there are some curriculums that require significant time commitments, many of our current technology and soft skills training courses in the corporate world have not been re-examined against this emerging work culture filter. The research proves that too much information at the point of need is as ineffective as too little of it. Today's business world requires training to be "just-in-time" and "just-enough" to get people through the learning curve of using a new technology or performing a soft skill. Our nomadic workforces add an additional level of complexity, particularly in parts of the world with little connectivity.

Effective learning groups are figuring out how to deliver what people need to know, when they need it, in small increments and without necessarily having them return to the classroom. They are sweetening the knowledge bank with "fun kernels of knowledge" and dropping them like cookies all over the workplace in subliminal marketing attempts to encourage learning all the time: not just when employees are forced to learn. Learning teams are increasingly used for collaborative efforts, like facilitated working sessions for detailed planning or situation appraisal and decision analysis. Educators supporting technology training are joining project teams earlier and helping to develop workflows with subject matter experts ahead of deployment.

Relevance in Practice. In building our learning strategy, I leverage my background first. I use what I know about my industry, about my customer base and about what my business operation needs right now. I use my professional experience as a journalist, operations manager and project manager to support my work as an educator. I ask questions, gather intelligence from key business partners and colleagues, and listen to what my team tells me. In my personal practice, this means:

- *Journalist:* I learn everything I can about the issues, problems, concerns and business constraints around a project or assignment. I ask "who, what, why, when, where and how" questions, which is a critical skill because it scopes your work and sets expectations.

- *Project Manager:* Waterfall, lean, agile, facilitation, scheduling and Kepner-Tregoe problem solving and decision making processes are used every day within my learning team. We plan our work and work our plan. The plan changes every day, but with a team approach that includes shared assignments and internal mentoring across trainers, there is always someone who can pick up a piece of the work. These skills help me:

    - Develop a training project plan, most frequently in the company of my key team managers and project leads.
    - Build my team members into learning leaders.
    - Reinforce a structured process that serves as a framework for how we build classes, without stifling the practicality of what is needed in the moment.
    - Get the job done as quickly and efficiently as possible.

This constant planning-review-strategy cycle of communication demonstrates to the team members how their work directly aligns with corporate strategy and business need. The trick is, I use whatever strategy and tools I need to use in order to get the job done, and I do not hesitate to abandon one that is failing to try another approach. As planners, we take good notes, keep our data in order and vet each others' work.

- *Operations Manager:* My decisions are based on operational impact and overall alignment with the business strategy. I always examine from a strategic point of view:
    - What are the impacts to our user groups?
    - How broadly will this new technology be deployed?
    - What is the risk involved with this technology?
    - What is the timing of this initiative?
    - Do I have enough people on my team with the right skill set to deploy and support this initiative successfully? If not, is there some other way I can support this client with my team's expertise? Can I help them build a subject matter expert through coaching?
    - Once training has been delivered to the first class, was it successful? Does it need to be modified?

The toughest thing to do is to check your ego at the door. Putting people together into small teams to build new curricula helps us to avoid this pitfall, especially in an environment where ideas are welcome and feedback is not taken as a personal attack. Even with all of this, sometimes, on rare occasions, we have to pull a curriculum apart and start over. But we do it as soon as we identify we have a problem and we take time afterwards to analyze where we went wrong and what we could have done better. Failure at the client level is simply not an option. Failure to learn from a mistake is a lost opportunity.

Once you stay relevant, then the challenge is how to find the time to do all the work that starts coming your way.

Leadership Skills. Leading a team like this is particularly challenging because educators are smart and motivated. Keeping one step ahead of them in terms of keeping them engaged, relevant and aware of the business strategy takes effort. Operating transparently as a leader requires a tremendous amount of two-way trust. It also requires communication, demonstration of key values in everyday work, and the ability to "read" your team on any given day, both in terms of what it needs to get the job done practically and emotionally, and what it is up against in terms of client expectations and business demands. You cannot do this in a vacuum.

Many learning managers are good leaders within their individual education silos, but in this global village, you can no longer afford to lead in a small silo. You must make time to network with professional colleagues and clients inside and outside of your area. You must demonstrate the values you want from your team. Your actions and words during the normal course of work is a form of teaching. Your team will show you what you show them in kind.

As a manager, my strategy is to build leaders: not teams. Good leaders function exceptionally well in teams and, in order to handle the volume of work we have, I need people on my team at all levels who can make sound decisions around all the right business parameters. This means that members of my team are coached through new professional situations – stretch assignments – in order to ensure success and help make each assignment a training opportunity as well. Everyone gets several stretch assignments each year, which forces them to think outside of their normal work patterns and processes. My managers and I spend more time watching these kinds of events than the day-in, day-out work.

My daily work as a learning leader also includes some amount of planning time and thinking about what my team needs to keep forward momentum going. I prioritize work that will keep someone progressing forward towards delivery. I review what we have on our plate as a team at regular intervals to see how things have shifted. I am always gauging how much work is in the cue to be done my team – and by me – over the next few days, months and quarters.

Strategic Approach. Our strategy is to think practically about the work we have. We examine resources, costs, time to deliver and expertise when making decisions around curriculum. We also share our tools and process templates with others we cannot support, and help them build sustainable training within their own departments. We participate on project teams and business teams in order to network, get information from others and increase our visibility at the company level. We share information we hear if we think it involves a training initiative and we follow up with our client base on a regular basis.

I delegate a lot of work and solicit and encourage feedback from my team to ensure nothing derails. Progress is tracked as a team in weekly meetings. If it has gone off track, it is always easier to fix if caught early, and the team approach is a quick way to solve a problem and assign extra help if needed.

In a throwback to TQM (Total Quality Management), I have empowered every person on my team to push an imaginary “stop” button on a project long enough to state an issue or concern and get resolution. Many managers see pauses or stops in work as productivity killers. I see them for what they really are: what keeps us from wasting time and money by doing something stupid.

Listening is another key ingredient of our learning formula. Information can come from many sources. Great leaders do not let their egos stand in the way of good intelligence from trusted, seasoned professionals, regardless of their role in the organization or their level of experience. Fixing mistakes before they get outside your team is the end goal, because the alternative - taking something half-baked to a client - is credibility suicide.

A key game changer for my team is that we have worked to figure out our learning culture. In doing this, we have defined the difference between Trainer and Educator as it applies to us and our business model. To our clients, we are first and foremost a training team, so we wear the mantle of “Trainer” proudly. Training implies showing someone how to do something with a variety of tools and methods. We use an instructional design methodology process and subject matter experts to separate the “need-to-know” from the “nice-to-know” information. We then translate that into repeatable actions our employees use to get work done. This model has always been successful.

But I expect more than that from my team. They are seasoned enough to deliver training AND education. Many of them already did it instinctively because of their professional backgrounds, providing perspective in areas that were not technically our purview, like editorial judgment and ethics of reporting. Our strategy includes building context into the training we provide to help users understand what’s in it for them. This extra step is the difference between training and education. It requires experience, gravitas and commitment. Whether or not our customers recognize we are providing this extra knowledge and context is somewhat irrelevant, because we see its impact in the results.

It also means that, in my team, new trainers have a steep learning curve. Learning the technology is only half of the job. They also have to learn how it should be used by employees in ways that align to our core business mission and values. More senior members of my team work with less experienced trainers over time to help them achieve the level of educator we need them to reach. We start our new training employees with a comprehensive training plan that includes all of our processes and technology. We solicit opportunities to embed trainers within work environments around our company so they can better understand how our clients use the tools we train on and what the risks are around corporate policy. We partner with our HR and professional development colleagues to ensure that there are no training gaps in what we deliver and that we are aligned with corporate policies. Although we do not teach what they do, we highlight policy guidelines as part of our classes and cross-promote the work of our learning colleagues within the organization to ensure our clients get the total knowledge base they need to succeed.

Multi-tasking.

In many learning organizations I have visited, it is not uncommon for trainers to work on one or two projects at a time. Members of my team typically juggle several different work assignments and types of work simultaneously. Brain fatigue is real. When your job is to simplify complicated information into small, retainable nuggets that can be applied by a worldwide user group, the pressure to perform is real. Working on a single project, all the time, is far from optimal for educators. Conversely, having a lot of things to work on (knowing deadlines loom for delivery but still having that option to disengage and pick up something new) flexes muscles that many educators ignore.

The plus side of this is that we bring diversity of information and knowledge to the team, which is reflected in the quality of our assignments and in our decision-making process. We get a lot done because we keep things moving all the time. The downside is that we get a lot done, so a lot more work is forwarded our way, but in this economic climate, that is not such a terrible thing.

Continuous Learning.

This year, I have challenged my team to devote 3 hours a week to learning something: anything that they could share with the team that was not curriculum. Educators need to keep learning or they will eventually burn out. It is part of their creative process.

Leaders of creative teams need to know what skills their team has, especially the ones they do not use at work. You may find a golden nugget of experience in the mix that you can use to enhance your curriculum.

I also keep track of what I do not know and look for opportunities to educate myself and my team. This is true of our learning projects in flight, but it also applies to emerging business trends and tools, as well as changes in my own company's strategic plan and vision.

Embrace Teachable Moments.

Not all learning has to happen in a classroom or in a formal setting. Sometimes that one kernel of information at the exact time of need, face-to-face, is all it takes to convert a critic to a believer.

Analyze Opportunities and Threats.

As part of our regular meetings, our status reports include debriefs from project leads that highlight opportunities and threats. When a project has either one of these, we explore and mitigate threats and figure out how to exploit the opportunities.

But the most significant meeting we hold is our strategic planning meeting each January. In it, we cover our successes and failures from the previous year. We also identify what we want to accomplish in the current year in terms of our own performance. The first year we did this, we were getting to know each other. I was the new kid on the block and they were skeptical of me. I facilitated the entire meeting. I closed it out with my performance goals and vision for the team evolution. We took notes and kept them. It was our "action plan." Everyone was energized and on the same page.

Twelve months later, members of the team participated in running the meeting. We repeated many of the same exercises, particularly the vision session where we detailed what we wanted to accomplish, and I pulled out the previous year's notes. We compared our action plan against our actual performance and the "aha" moment happened around the room. The team realized that by taking the time to analyze what we had achieved in the previous year and envisioning how we wanted to change our work, we could deliver what we set out to do. These were not all simple things. The list included things like building credibility as a team, improving our learning processes and improving our client relationships. We wanted to say "no" less and "yes" more. We wanted to be challenged by our work and to be present and visible on project teams. In twelve months, we accomplished this in small, incremental steps from week to week. We planned our work and worked our plan. And it worked. We accomplished 95% of what we said we would in the way we said we wanted to do it, because we employed a strategy that embraced change.

The fact is that our strategic roadmap changes as much as our business does, but our strategy does not. We focus on fine tuning our processes so we can accommodate change and keep up with business demands. We work on ourselves and our skill sets. We lead by example. And, most importantly, we do not sweat change anymore. As a team of learning leaders, we make it happen.

Examples of Strategy in Action.

Blitz. In 2010, we crashed together a curriculum for a critical business initiative with zero notice. In less than 48 hours, we designed, developed and learned a course that we taught on a rotating cycle the next day. We called this our "blitz" methodology, because we had never put something together so quickly and been in a position to deliver it with speed. We only taught what was absolutely necessary in the classroom. We kept classes short and provided handouts that were brief but covered the basics. We offered classes all day long, including distance learning. Our customers loved it. They learned what they needed to in 30-minute increments and we offered the class so regularly that they could catch it when it fit into their schedule. Client response was fantastic. We knew we were on to something.

This year, for our annual strategic planning meeting, we felt we could take what we learned from the new blitz course in 2010 and build upon the theory that less is more with some of our mature, business-critical courses. We had been delivering them for so long that we had not stopped to think about how we could make them better and more engaging. There was no reason to ever revisit the class outline because it had, in fact, worked very well to date. So, we broke up into four teams, identified four of our high frequency courses that we deliver year round and decided to pull them apart.

We took a different blitz approach this time. Teams were given a few minutes to look at the old outlines and identify what was critical versus "nice to know" information. We eliminated the fluff. Through incremental, timed exercises that focused on one thing at a time, we modified the courses throughout the day, building new outlines and identifying what content could be pushed to alternative delivery methods like Captivates, quick start guides and online videos.

Results? Two of our 90-minute classes were pared down and combined into a single, one-hour class. That's two hours of savings per student! Another pairing cycle turned 4.5 hours of class time into a three-hour course, saving 90 minutes per student. We added more practice drills in classes that helped infuse some fun into the learning mix. Collaboration between members of my team and willingness to shed ego about what the courses contained made this successful.

Tips for Creating and Sustaining a Performing Learning Team

- Break out of your silo of learning and experience your corporate culture through your client groups. You can do this by:
    - Conducting appreciative inquiries to understand their 6-18 month roadmaps for work.
    - Taking time at the end of a project to ask customers if the training was effective and relevant.
    - Reaching out to other educators in your organization and asking them how they do what you do.
- Operate transparently within your team.
    - Share business knowledge and how it impacts your work.
    - Demonstrate this by communicating information and changes efficiently and quickly.
- Develop work processes and models that can accommodate change.
- Build leaders. Develop your teams' leadership skills by:
    - Demonstrating the skills and values you want them to emulate.

    - Encouraging continuous learning and self education as part of the team's work.
- Manage your resources wisely: people, money and time.
- Track your metrics and tell your story. The C-suite needs to know what you do and how successful you are at it.
- Do not be afraid to take risks with your curriculum, especially if it is stale or mundane. Do this by:
    - Looking at it with fresh eyes.
    - Challenging your team to identify critical versus "nice to have" curricula.

If I were asked for help by someone developing a learning strategy from scratch, these are the five most important points I would share:

- You must know exactly where you are now before you make any changes to strategy. To do this, you need two key pieces of information:
    - What your team actually delivers, including how much, how often, and to whom. It is important not to exclude how your team members feel about their work performance in this analysis. If they are not happy, you must find the root of the problem.
    - What your clients think of your team's work. How is it received by them? What are the challenges your clients are facing? Are they satisfied with what you are delivering in terms of content, class duration, delivery methods, etc.?
- Dream. Specifically as the leader, develop a vision for how you want your team to be perceived/received. What does your final strategy look and feel like? How will your team members perform once your strategy is implemented?
- Strategically target solutions in your strategy. If you attempt to solve every problem all at once, you will fail. My approach is to work on the easiest things to fix first, and execute expeditiously so that the team has a quick win. Once this is complete, you should prioritize how you tackle your more significant objectives based on critical need and volume of clients served.
- Execute your strategy through small – not large – tasks. Real change does not happen overnight; however, consistently finishing many small things eventually adds up to big change.

- Evaluate how you are doing with your entire team. In order to do this, the whole team has to understand your vision and believe it is achievable. Then, work with them to measure how well your tasks are accomplishing your goal. If your tasks do not align with your end strategic vision, then you must regroup and realign to your business plan.

Lisa Pedrogo, CNN

Lisa Pedrogo is the Director of CNN's Broadcast Engineering and Systems Technology University. In this position since 2008, she manages a team of educators that develops and delivers customized curriculum and training to CNN employees worldwide. BESTU trainers actively participate on project teams, provide facilitation and consultation services around training initiatives, and perform acceptance and QA testing on new hardware and software. Previously, Lisa was a senior project manager with BEST, responsible for the CNN HD network launch, the New York Time Warner Center build and the LA Bureau renovation. Prior to that, she was the director of operations for CNNfn. She began her career at CNN in 1989 as a production assistant, holding many newsroom positions before crossing into operations management in 1995.

Building the Case for a Learning Strategy

A Strategy Perspective from Waste Management, Inc.

Ruben Bonales, M.Ed.

Nervous does not seem to be the appropriate word for this situation. Concerned? Yes. Intimidated? Maybe. Prepared? As much as is possible.

December, 2010 - I was sitting outside the Waste Management Board Room with my Senior Vice President of Human Resources, waiting to provide the board with what could be the riskiest yet most beneficial presentation of my career. I was about to present a three-year strategy to the Waste Management Board of Directors on how our learning function was going to provide tangible, track-able and significant business results to the enterprise. Additionally, I was about to make a commitment to the Board that our learning function would have a new dashboard and reporting system to show these results by Q4 of the following year. I would essentially be committing my team and self to presenting the board with something that our organization had never seen: true learning effectiveness measures.

Before I continue, let's step back three years to when I first started constructing learning strategies for Waste Management. In other words, how did I build and execute a learning strategy that could gain the attention of the most senior oversight for our corporation, the Board of Directors? Three key areas enabled me and my team to gain this level of visibility: alignment with organizational goals, strong relationships with the business and tangible business results.

First, let us look at aligning learning strategies with organizational goals. Aligning learning outcomes and objectives with organizational goals is paramount in constructing an effective learning strategy. I came to work for Waste Management in 2006 as the Training Manager for Fleet and Logistics. At the time, there had been no learning support provided for this business function as they were seen as a cost center for the organization. Vehicle procurement, setup, repair and operation were necessary costs of doing business in a transportation environment, but not generators of revenue.

Consequently, a new Vice President of Fleet and Logistics had been promoted from within the organization and she saw the need to show more business integration within the Fleet and Logistics group. She came from a military background where learning was tied directly to business goals and objectives. The military motto for training, "if there was training to be held, there were results to be had" resonated with me, as I too come from a military background. I was just leaving the Air Force after over thirteen years of service. Most of that time was spent in direct or indirect support of learning.

My first objective in coming to Waste Management was to construct a learning strategy. To build this strategy, I conducted a needs assessment. As with most things learning related, there are many ways that one can conduct a needs assessment; however, one key that I have found in conducting an effective needs assessment is understanding the organizational strategy and goals. That means knowing how those goals cascade down into the business and identifying what gaps exist in knowledge, skills or attitudes/behaviors (KSAs) that can be filled in order to attain these goals. During my needs assessment, it became very clear that there was a lack of KSAs in all levels of Fleet and Logistics. No formal or standardized training was being provided by the company to our frontline mechanics, our maintenance supervisors or our senior maintenance leadership. The decision tree for promoting someone to leadership within the organization dealt mainly with organizational tenure, usually within a role that did not require the same competencies as the promotable role. In addition, the hiring of technicians was very inconsistent. There was no form of competency assessment to ensure that we were hiring the right individual who had the right level of skill required to execute the job effectively.

The next key piece of data I identified in my needs assessment was related to Key Performance Indicators (KPIs). Overall maintenance cost, task cycle time and vehicle up time were three KPIs that had become departmental goals and emerged from the organizational goal that demanded cuts of $50 million in maintenance spend in one year. In addition, I identified that the Maintenance Managers (or Fleet Managers) would be the key points of accountability for ensuring the attainment of the overall maintenance spend reduction. As a result, one of the first tactical objectives I determined was to build and execute a learning event designed to measure the effectiveness of our new Maintenance Managers in executing the fundamentals of their job and their ability to deliver on their KPIs. We needed to support them in that process.

There were several steps involved in developing Waste Management's first new-hire Fleet Manager training event: Fleet Manager 101. First, I constructed a competency model of what the ideal Fleet

Manager should be executing given the company's strategic direction. Second, I created a blended learning experience that required both pre- and post-work, as well as some online and classroom sessions. Third, I created a measurement system to ensure that all four levels of Kirkpatrick's Model were being captured. Finally, I piloted the program to ensure overall effectiveness.

Six months later, I piloted our new Fleet Manager 101 program with two groups of new Fleet Managers. The requirements to enter the program were simple: 6 to 18 months in the role and nomination by their managers. We piloted the course and I am happy to state that not only was the program successful in levels one to three of learning evaluation, but the level four results exceeded expectations. Maintenance costs for the two pilot groups (measured in cost/driver hour) decreased by $.28 vs. $.03 for the rest of the Fleet Managers. Vehicle up time increased 9% in the pilot groups versus 3% for the rest of the organization. In addition, maintenance reworks (having to redo a maintenance failure that has already been completed at least once) decreased by over 30% in the pilot groups.

The course was such a success that it became mandatory for all Fleet Managers to attend. Additionally, the one-person role I was in extended to a team of fifteen people, all of whom I led, and we exceeded our maintenance savings goal for the year. What was the key to this success? Aligning learning strategies with organizational goals. Not all of those results would have been realized if there had not been a direct linkage between the learning strategy that we developed and the company's goals. Alignment ensured success and paved the way for continued success in the future; however, alignment to organizational goals is not the only ingredient for success in creating and executing an effective learning strategy. Business relationships are imperative if you want your efforts to become more than a temporary success.

Have you ever seen a business book entitled, *How to Gain a Seat at the Senior Leadership Table When you are in Operations*? Neither have I. Operational roles do not have to gain credibility. They already have, by definition, validity, accountability and tangibility with regards to the organization. Learning, though, can be a different story. Corporate Learning Strategies must have all three of those components in order to be successful. Moreover, great business relationships need to exist to facilitate and keep a seat at the Senior Leadership Table.

Prior to my current role with Waste Management, I was the Director of Customer Optimization. My role was hybrid in that I led a team of process improvement professionals who looked to optimize the end-to-end customer experience along with a small team of learning professionals responsible for the successful implementation of the other half's initiatives. Spanning the entire customer experience presented quite a challenge in that almost every area of the business was impacted: sales, setup, operations, maintenance, contact centers, etc. As you can imagine, each function had its own marching orders and agenda, making universal acceptance of any process, standard or metric changes extremely challenging.

Relationships became the backbone of what my team and I would execute over our strategy during the three years I was in this role. It is one thing to construct a strategy for your own team and execute it. It is another challenge to affect a team for which you have no responsibility, but a lot of accountability. Building relationships was crucial. To do so, I had to be able to speak the same language as my business partners. Delivering a lecture on Maslow's Hierarchy would not have been career enhancing! I am also certain that the name Kirkpatrick would have meant nothing to my business counterparts. Talking about their team's goals, understanding the business needs and speaking to parallel learning and business objectives were the keys to creating and sustaining solid business relationships.

Two of the most challenging Vice Presidents that I worked with happened to be the two biggest internal customers for my team, and both had differing views on how I was to execute my team's strategy. One of the VPs wanted to look at the tactical details prior to engaging the organizational picture. She wanted processes to be fleshed out for operations before we began our change management strategy. The other VP also wanted to look tactically at getting our frontline employees soft skills training, but also prior to taking the first steps of the change process. Each VP had a valid point of concern and objective to be accomplished. The question was, how could I get them to see that we needed to step back and look strategically at how the rollout and implementation plan would be most effective? In a sense, I needed to be seen as a trusted advisor and strategic partner: not just an instrument for dictation.

I spent long hours meeting with both VPs in order to understand their goals, discuss overall strategy and identify how our team would support this strategy. In the end, I was able to establish some key relational components with each of them: credibility, trust and accountability. All three were required for me and my team to put the wheels in motion and gain the business results that we all wanted. Again, the key here was speaking to our goals, which were the organizational goals for which all of us were accountable.

In the end, my team's results were astounding. I was able to gain buy-in, commitment and support from all of our key stakeholders. The locations that piloted our new programs realized a 21% increase in Customer Engagement scores and I had established a business relationship that spanned the organization and fostered my team's seat at the table of the Senior Leadership Team. This was the impetus for change, not only for our team, but for the organization as a whole.

One key to success that may be obvious based on my previous points (and is, frankly, what I believe to be the greatest key to building and executing learning strategies) is the need for business results.

I would argue that no learning strategy is truly effective if that strategy does not tie back to business results. This final piece of the learning strategy puzzle is truly the most important. The results I have listed all belong to the business. All levels of learning effectiveness measures are important and no learning professional would argue that. Nevertheless, without the business impact measurement, in my opinion, your strategy is flawed.

In 2007, the Senior Vice President of Human Resources for Waste Management set a goal of returning $.25 Earnings per Share (EPS) to all Waste Management shareholders by the year 2010. Bold moves considering most HR departments seem to be focused on internal clients rather than external ones; however, the SVP of HR saw the value in marshalling people strategies, and he understood the need to gain a seat at the Senior Leadership table that went beyond tradition Human Capital boundaries. Consequently, each department under his headship was responsible for not only constructing, but also executing this strategy. No part of HR was to be left out. We would succeed or fail together as a team, and this included the learning and development team as well.

Over the course of the next three years, HR became a trusted advisor and true business partner. The Human Capital process was seen as a pipeline with each part of HR taking ownership of key pieces, accountable for the overall outcomes. We marshaled resources to improve our Talent Acquisition process and technology, our on-boarding process, our development and mentoring processes, our system of rewards and our processes for internal promotion.

In 2010, we could list all the tangible Human Capital metrics that had been impacted through our HR team's efforts. We could show how we had slashed the time required to fill vacancies, decrease turnover, etc. Nevertheless, what really grabbed people's attention is when the entire HR Team presented the result of $.28 EPS realized through our HR initiatives by 2010. We had not only met, but exceeded our goal by $.03. As our SVP of HR closed his team's presentation to the board, the metric that held the most weight was the metric that affected our most important stakeholders: shareholders. Having tangible business metrics is what made the difference in not only our learning strategy, but also our organization's overall strategy.

Flash back to my opening – standing outside the Waste Management Board Room waiting to present a three-year strategy to the Waste Management Board of Directors on how our learning function was going to provide tangible, track-able and significant business results to the enterprise. What got me into this position? Three things regarding my learning strategy: alignment to organizational goals, strong relationships with the business and tangible business results. The board took a break after I concluded my presentation. I cannot tell you how many of its members, including the CEO, came up to thank me afterwards for my presentation, but most importantly, for having my eye on the business. I did not get their attention through learning effectiveness measures or "HR speak". What got their attention was my focus on what is most important to them: the business. After all, the business is what we are all here to support, and if we are to support the business effectively, we have to be able to show the value we bring to the business. That is what a solid learning strategy does, and does extremely well.

Ruben Bonales

Ruben Bonales, formerly worked as the Director of Corporate Learning at Waste Management and now is the Associate Director for Global Leadership Development, Astellas

Ruben Bonales joined Waste Management, a FORTUNE 200 company with revenues of $12.5 billion and nearly 45,000 employees, in 2006. He became the Director of Corporate Learning in 2009. In this role, Ruben was responsible for Instructional Systems Design (ISD), Waste Management University (WMU), Learning Effectiveness Measures, Leadership Development, and learning support to the corporate functions. In 2011, Ruben left Waste Management and is now the Associate Director of Global Leadership Development at Astellas. In his new role, Ruben is responsible for developing and executing the company's first global leadership program, starting with senior executives located across the globe. Ruben has over 15 years of global learning and organizational development experience and holds a Bachelor of Science Degree in Occupational Education/Business and a Master of Education Degree in Business, both from Wayland Baptist University in Texas.

Learning Strategy at Shell: 2 Parts, 3 Pathways & 3 Horizons

A Strategy Perspective from Shell

Willem Manders

Introduction

Objective

This chapter explains Shell's learning strategy and provides insight into:

- How the Shell learning strategy is structured
- How the strategy is built
- The key priorities for 2011 and beyond

Shell

Shell is a global group of energy and petrochemicals companies with around 93,000 employees in more than 90 countries and territories. The objectives of the Shell group are to engage efficiently, responsibly and profitably in oil, oil products, gas, chemicals and other selected businesses, and to participate in the search for and development of other sources of energy to meet evolving customer needs and the world's growing demand for energy. The main businesses are:

- **Upstream** explores for and extracts crude oil and natural gas.
- **Downstream** refines, supplies, trades and ships crude worldwide, manufactures and markets a range of products, and produces petrochemicals for industrial customers.
- **Projects & Technology** manages delivery of Shell's major projects and drives the research and innovation to create technology solutions.

Learning Organization

Shell has a learning organization that basically mirrors the business organization, supplemented with a central team. Each business and function has a VP of Learning and Organization Effectiveness to respond to the business needs. The central team consists of a VP for Enterprise Learning (all company-wide learning portfolios), a VP for Organization Effectiveness, a VP for Diversity and Inclusion and a VP for Strategy and Planning for Learning. All of these VPs report to an executive VP for Learning, D&I and OE, who reports to the Chief HR & Corporate Officer.

Reporting to each VP are either learning managers, responsible for managing the needs assessment and service provision to particular businesses/audiences, and/or portfolio managers, who are responsible for development and delivery of parts of the learning interventions. Some of the jobs are done by the same person.

What do we mean by learning strategy and how do we frame it?

Definition:

Our previous CEO summarized his view on what strategy/leadership is as follows:

"My Leadership model is simple and consistent. You can do the same:
A) Take Stock of what is good and bad today (in your area of responsibility).
B) Have a clear picture some years out of where your outfit should be. Communicate that picture to your people. Be realistic. Inspire.
C) Figure out with your people how to go from A to B. And do it."
-Jeroen van der Veer – Shell Business Week, 2007

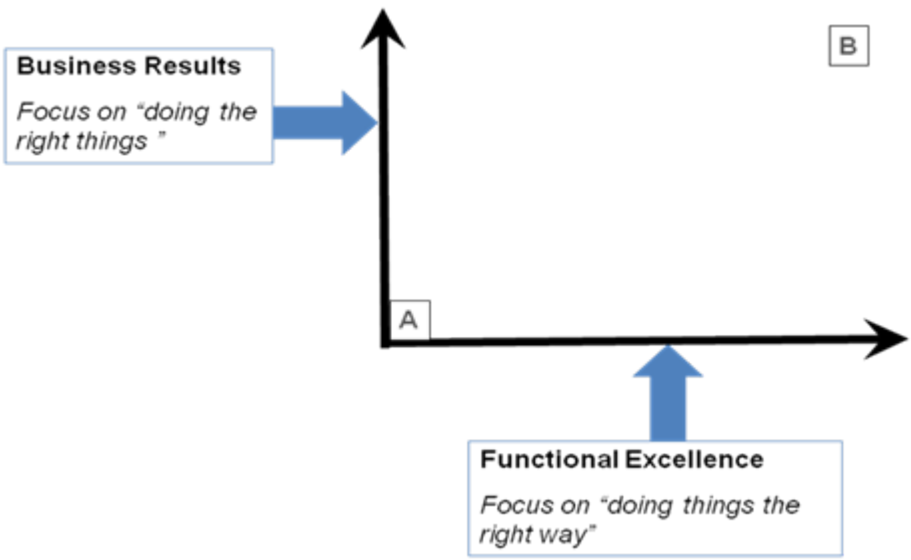
Strategy frame

Shell's learning strategy is built the same way. Shell's learning strategy basically consists of two parts or dimensions. Both are important, but for different reasons.

The first part is around what learning is going to focus on to deliver business results. This part of the strategy is really around identifying the key focus areas for learning to work on in the short, medium and long term. This is really about the business focus areas and critical capabilities on which learning needs to concentrate. It is about focusing on doing the right things. An example of this is the need to build capability in Lean/Six Sigma in our organization in order to improve Shell's ability to continuously improve our business processes.

The second part is the functional excellence part of the strategy. This is really around delivering learning in the right way: efficiently and effectively. It is about focusing on doing things the right way. An example of this is the need to upgrade our learning management system in order to meet current and future needs of the organization - to deliver learning in the best way possible for our company.

Both of these together form the learning strategy. During the rest of this chapter, it will become clear that these two parts are very interdependent. The picture below shows point A, point B and the two dimensions of our strategy.



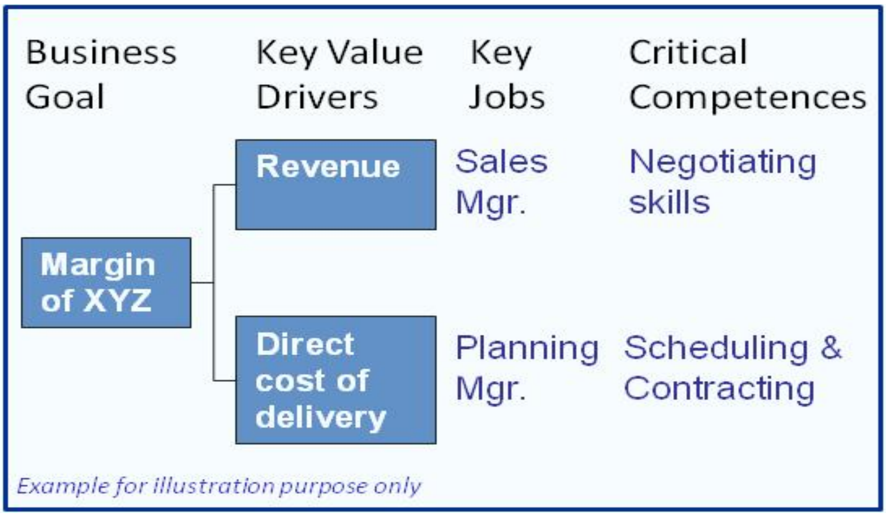
How we build the learning strategy

The two parts follow a different process on how to build them.

Business Results

The business results part is built at different levels and timescales within Shell. At the highest level, it is defining a multi-year direction for the key global skill-pools in Shell that will help to maintain and grow the business. It focuses on those skill-pools that provide real competitive advantage. For instance, in the oil and gas business, this means that building skills on how to drill wells is more strategically important than certain HR skills. This prioritization is important to help direct and focus learning efforts.

This multi-year picture is complemented with annual learning reviews. The learning review process is an annual, standardized, senior business leader process across all businesses to help set local and global business priorities, and measure impact.



This process is based on using different data sources (including business strategies and priorities, existing competence data, employee engagement results, etc.) to paint the picture for a certain business or function. The review consists of a number of parts: review past year's performance, assess business priorities and identifying critical capabilities, identify ways to build/strengthen the critical capabilities and agree on key metrics. In many cases, the learning review turns into a performance contract between the business and learning around key deliverables and performance metrics.

At the lowest level, the business results dimension consists of regular discussions between the learning managers, who are based in the different businesses, and their business counterparts.

Functional Excellence

The second part of building a learning strategy, functional excellence, is focused on building a top quartile learning organization. At the highest level, Shell conducts a bi-annual, in-depth benchmarking process to assess where Shell learning stands in terms of functional excellence. This process uses both qualitative (using reference models) and quantitative (learning metrics) data. Besides positioning learning, the benchmarking process is also being used to identify best practices outside the company.

The same models (basically looking at different organization capability dimensions) for assessing Shell's overall position are being used to assess different learning areas and portfolios inside Shell. This enables best practice sharing within the company among the different businesses and functions.

Capability Dimension	**Key Questions**	**Remarks**
Processes	- Does the organization have the right processes in place? - Are they well connected and performing efficiently?	Shell has developed a global people process model for the whole of HR, including specific learning processes.
Structure & Governance	- What processes is the organization going to do internally versus offshoring/outsourcing? - Does the organization have the right roles and responsibilities (linked to the processes)?	The learning governance in Shell has been recently (2009) redesigned as part of a company-wide reorganization.
Information / System	- What are the critical pieces of information required to run the learning processes? - What systems are required to support key processes and drive the information flows?	The system infrastructure has been consolidated into one global architecture.
People	- What are the critical capabilities required to make learning work? - Do we have the right number of people, right location, right skills, right diversity?	Shell is really looking into expanding performance consulting skills and leveraging the OE relationship.
Culture	- What does a supportive culture look like (values, beliefs, behaviors, norms)?	The intent is to build a really supportive learning culture.

The focus for 2011 is to upgrade the learning management system and to establish a continuous improvement culture inside learning to enable continuous process improvements.

Both business results and functional excellence help to define point A and point B. The descriptions of point A and B are complemented with a dashboard and key metrics in order to assess and track progress.

Key Components of Our Strategy (Pathways)

As explained in the strategy definition in the beginning, strategy is about defining point A and B, but also about how to get from A to B. In order to help lay out that road, the learning strategy in Shell consists of three pathways:

- Business Impact: defining key stakeholders and diagnosing their required capabilities and performance
- Blended Learning: designing the right mix of capability-building interventions
- Learning Excellence: deliver interventions efficiently and effectively

If you compare this with a business strategy, one could say that the business impact is basically the sales and marketing strategy. Blended learning is the marketing/product development strategy, and learning excellence is the manufacturing/delivery strategy. The business impact is around value identification; learning excellence is about value realization. Later in this chapter, some examples for the different pathways will be given.

Another way of looking at this is to focus on two key “translations” that learning needs to do. The first is to translate business priorities/challenges into critical capabilities. This requires diagnoses of the business problem to see if there are any underlying capability problems. This is very much a performance consulting type of role/skill.

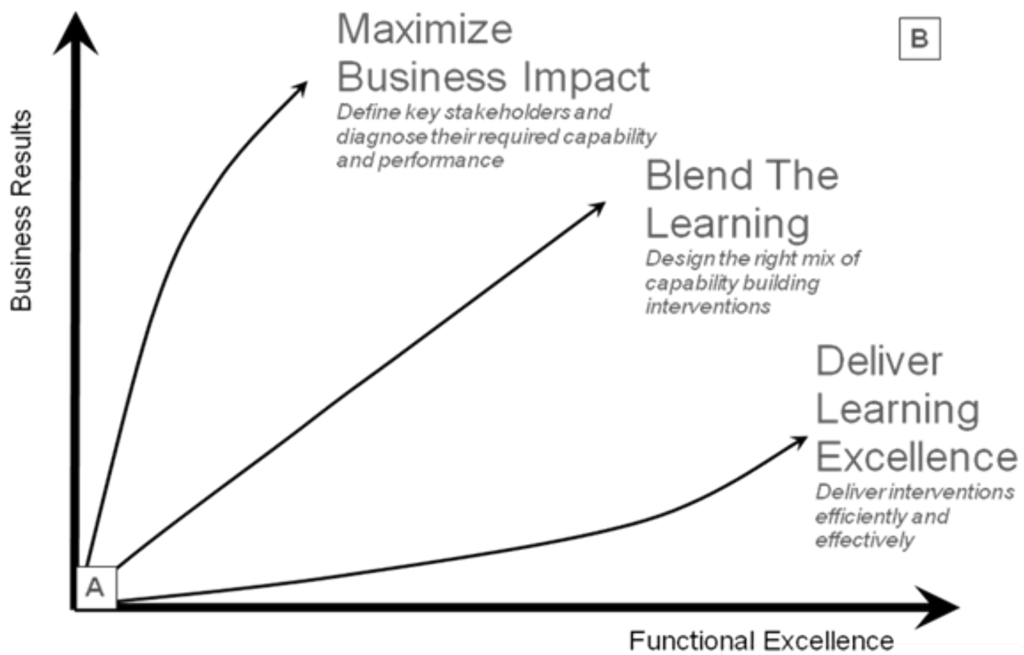
In Shell, we are trying to build and strengthen this further. Since the company reorganization in 2009, the organization effectiveness function is part of the same organization as learning. This helps to identify and diagnose broader causes of performance challenges.

Secondly, learning must translate the required capabilities into the right learning interventions to build those capabilities. This is a combination of classical learning interventions and much broader capability-building opportunities (including reference materials, on-the-job learning, etc.)

The knowledge sharing group has been part of learning since the company reorganization in 2009. This helps us look at a wider range of interventions, both formal and informal, to build capability. Informal interventions are important additions to our portfolio.

Each of the pathways basically has a vector on the two earlier defined parts. Business impact has a large business results section and a small functional excellence section, while learning excellence has a strong functional excellence section and a smaller business results section.

See the next picture for a visual representation



3 Horizons

The third element to complete our strategy framework is our 3 Horizons Model, which is based on the McKinsey model of the same name. The different horizons have a different way of managing, but all are part of how to get from A to B.

Horizon 1: Maximize results from our current business operations. This is mainly about running and maintaining the current learning activities and organization. About 70-80% of activities fall into this bucket. This horizon is about running day-to-day learning operationally.

Key activities to manage this horizon:

- Learning organization mirrors the business organization (learning managers per business/function)
- Annual agreement on business priorities into tasks and targets of individual learning managers (based on earlier described learning review process)
- Set targets for continuous improvement of learning
- Standards and best practice sharing
- Continuously develop and strengthen skills in performance consulting

Horizon 2: Implement structural learning improvements. This focuses on activities related to structural improvements necessary to make the change towards point B. About 15-20% of activities fall into this bucket. This horizon is really about programmatic change. It requires heavy change management.

Key activities to manage this horizon:

- LearnNet (global learning governance body) sets the joint agenda
- Define structural improvement agenda based on business priorities
- Tailor implementation plan based on highest business need focus areas
- Strongly involve business in change programs

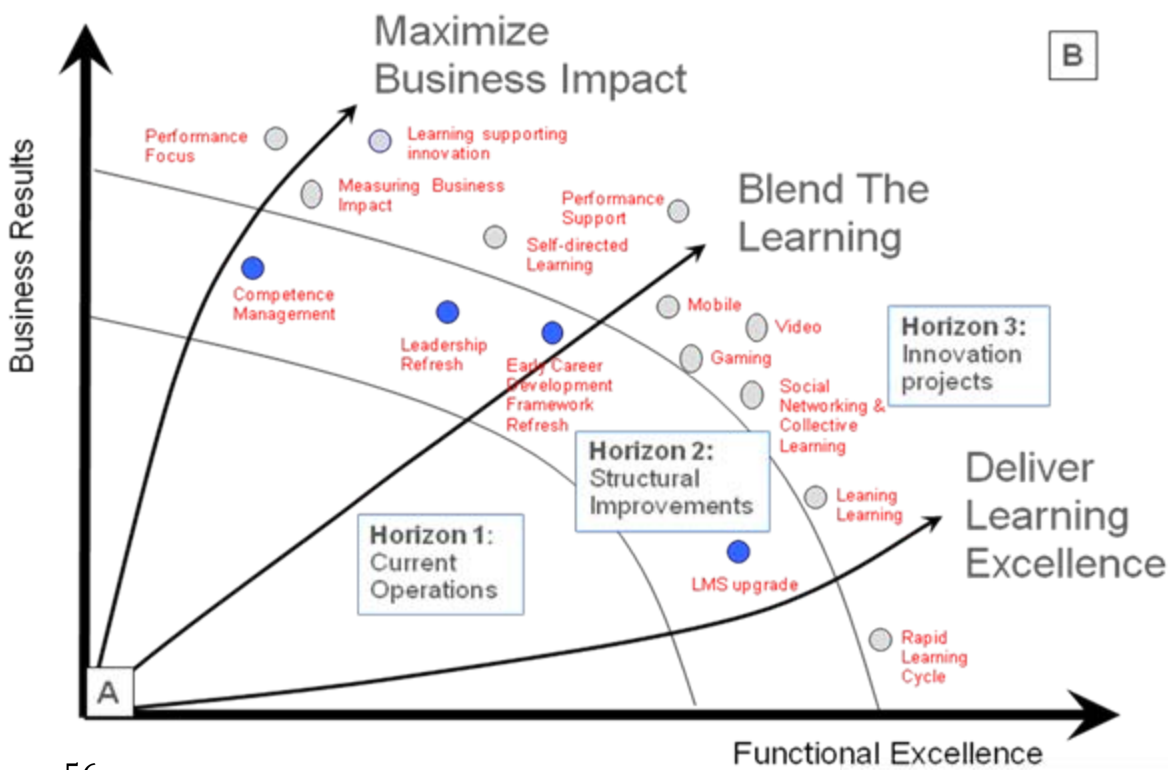
Horizon 3: Explore new horizons. This includes activities related to the exploration and introduction of innovative ideas into the learning space. About 5-10% of our activities fall into this bucket. This horizon is really about experimentation and learning by doing. It is all about learning from pilots and helping move the whole learning organization forward.

Key activities to manage this horizon:

- Strong business governance for the innovation funnel process
- Focus innovation on key business challenges (coming out of learning reviews)
- Find “docking points” for innovative ideas (“where the best solution meets the worst situation”)

Our Program for 2011 & Beyond

The following graphic summarizes the learning strategy for 2011 and down the road in terms of key activities and programs for horizons 2 and 3, which are more company-wide/global in nature. Horizon 1 is often very business specific, depending on the business priorities, maturity of the learning function, etc.



Structural Improvement Agenda

Our structural improvement agenda for 2011 consists of 4 key programs:

- Competence Management: renewing our competence management strategy. This is focused on maximizing business impact by more strongly defining the right set of required capabilities.
- Leadership Refresh: looking specifically at our leadership development portfolio.
- Early Career Development Refresh: looking at restructuring the graduate program.
- LMS Upgrade: upgrading the learning management system. This is part of learning excellence.

Innovation agenda

The table below summarizes the innovation focus areas for 2011. Highlighted are the innovation domains, key questions and how they are connected to the three learning pathways.

Business Impact	**Performance Focus**	Maximizing the return on investment of learning. - Where do we get the "biggest bang for our buck" in learning? - How can learning help drive high performance rather than just filling competence gaps?
	Learning Supporting Innovation	How learning can contribute to making Shell the most innovative energy company. - How can learning support the different parts of the innovation funnel/process? - Are learning interventions opportunities to stimulate, generate and capture innovative ideas? - Can learning help to run up the learning curve faster?
	External Value Proposition	Training people outside of Shell to support another business goal (new recruits, new deals, selling more products, getting better service, increased safety). - How is learning part of the value proposition that Shell delivers to its customers?

	Measuring Impact	Measuring the impact of learning on business results. - How can we measure success of learning to support decision making?
Blended Learning	**Performance Support** *(incl. Video, Mobile, Collaboration, Gaming)*	Bring learning close to the moment of need, allowing staff to directly apply knowledge provided through various sources (information, e-Learning, on-/off-line SME support). - How do we make more learning just-in-time and just-enough, rather than just-in-case?
	Self-directed Learning	Enabling employees to drive their own learning. - How can we make learning available to the learners when and how they need it and in the form they prefer?
Learning Excellence	**Rapid Learning Cycle**	Speeding up some of the key processes in learning. - How can we ensure that we are moving at the speed of business?
	Lean Learning	Applying lean methodology to learning to see where processes can be further streamlined. - Can we apply continuous improvement methodologies in learning?

In each of the focus areas, we are looking for specific opportunities to further explore. We are basically looking for the "docking points": where the best technology meets the worst situation.

One example of this is lecture capturing, a technology to video record sessions (both presenter and slides). The docking point for this opportunity turned out to be a specific course that needed to be delivered locally in Africa, with no availability of resources and budget to travel there. The capturing of lectures and follow up conversations (using video conferencing, etc.) enabled the learning to take place.

Final remarks

The aim of this chapter was to offer insights into how Shell builds its learning strategy. Unfortunately it is impossible to share all the details of this complex process, but I am happy to engage in conversations with other organizations about how, why and what our team has done.

Willem Manders, Shell International BV

Willem Manders' background is in industrial engineering and management science.

He started his career in consulting and project management, followed by six years working as strategic innovation manager in Shell's GameChanger program, identifying, seed funding and developing new step-out business opportunities for Shell. This got him really interested in exploring more how individuals, teams and organizations develop and learn, which is why he moved into the learning area 4 years ago. In his current role as the global manager, Learning Strategy and Innovation for Shell, he focuses on identifying ways to increase the learning potential of the company.

Putting the Strategy Back into a Learning Strategy

A Strategy Perspective from the Defense Intelligence Agency

Keith Dunbar

"An effective education and training function is tightly aligned to the priorities, culture and future direction of the business. My role as Chief Learning Officer is to create a learning strategy that continually meets these criteria and build the organizational capability required to effectively implement the strategy."

-Donna MacNamara
Former VP of Global Education and Training
Colgate Palmolive

Learning leaders like Donna MacNamara have the right perspective. As a leader, you have to understand the business or mission of your organization and align your overall learning capabilities with that explicitly. Although, as learning leaders, we are typically driven by day-to-day, tactical or transactional activities that, while important, may not help align the learning function to the business/mission strategy or build the future learning capabilities the organization needs to succeed. This is why learning leaders have to take the requisite time and effort to invest in creating a viable future learning strategy to enable organizational performance and success.

A Google search of the term "Learning Strategy" brings back 706,000 hits to explore. Needless to say, it is a good idea to clearly identify the details of the topic you want to explore, because learning strategy can be about the individual learner, learning solution or organization. Let us define it here.

For our purposes, I define learning strategy from the organizational perspective and will share my experiences developing a learning strategy, using it to guide activities, and how my team and I intend to leverage these lessons learned in the future.

The first major role for any organizational learning leader is to develop a strategic plan for Learning & Development that I will call the learning strategy. In an environment of immense volatility, uncertainty, complexity and ambiguity (VUCA environment), making the effort to define a vision for the learning organization and develop a plan that is both agile and adaptable to lessen, even negate, these factors is critical. Whether you are a learning leader in a new organization or have been in an organization for some time, developing a learning strategy is a smart approach.

The DIA Learning Performance Plan

Identifying the Right People

In 2006, the Defense Intelligence Agency (DIA) had just completed a reorganization to create the first Directorate for Human Capital that would include as a key component the Office of Learning and Career Development. A key aspect of its stand-up was to create a strategic learning plan that was called the Learning Performance Plan (LPP). The intent of the plan was to drive our transformation, captured below in the opening statement.

"This plan is a beginning. It represents a shift in culture from one that focuses on classroom execution to one that focuses on workplace learning and performance. It shifts the fundamental business approach from a supply model ("Build it and they will come!") to one that directly links training and learning efforts to improved worker productivity and organizational performance. It is the beginning of an effort to capitalize on a wide range of learning methods and modalities that can support every learner in every job. It is the beginning of linking learning to individual, team and organizational performance in ways that support both the individual employee and the organization's mission. This plan builds a baseline — a foundation for future growth as DIA itself evolves within the changing IC."

Like most learning professionals, we had limited experience in developing a strategic learning plan. As the one put in charge of this cross-office effort, I had to learn as I went. I did research and benchmarked organizations with well-defined strategic learning plans to understand scope of effort, framework and approaches to such an endeavor. At the end of the day, though, it started by getting smart people in the room that represented their organizations.

Lesson #1 – Selecting Participants

There were two different groups that participated in our learning strategy effort. The first group was the office leadership team known as the Senior Management Team that identified the strategic directions through a series of 5 goals and 20 objectives to form the basis for the plan.

The second group was identified to create a fiscal year implementation plan after the overall plan was completed. This group was a collection of division personnel who knew the activities of their division and could share those as we worked to develop key initiatives that would support implementation of the learning strategy.

Looking back on this experience, the first lesson for me is to be selective and prescriptive in the future when identifying participants in the strategic planning effort. The challenge in any activity like this is getting the right people in the room and involved in the process from beginning to end. This is important because you are going to depend on them to execute the plan and align their internal activities to its successful execution.

30/30 Rule

Today, in many organizations involved in strategic planning, 30% of the participants are 30 years old or younger. The reasons for this are that they have good ideas for what future learning capabilities and initiatives should be and are also less constrained by the history of the organization.

Engaging the Customer and Asking the Right Questions

This was my first lesson in developing a learning strategy in a vacuum. Our efforts focused on an internal group of learning leaders across our schoolhouse and learning support functions. While a very smart group, we neither made an effort to engage the customers prior to starting the learning strategy planning effort, nor did we engage in hard questioning.

Lesson #2 – Asking the Right Questions

To start creating a learning strategy, engage customers and ask, discuss and understand a series of key questions that drive the conversation. Please see questions below that are driving a new set of discussions at the DIA.

Mission Strategy

Organizations that have achieved success have a clear understanding of what they do best and what they do, or do not, want to change as they plan for the future. They understand the strategic capabilities that differentiate them from other organizations.

- What aspects of your mission strategy allowed you to achieve your strategic goals in past?
- Will those same strategic priorities help you achieve your future goals?
- Thinking back on the organization's recent strategic successes, which strategic priorities contributed most to those achievements? Will these same priorities ensure future success?

Human Capital/Talent Implications

The foundation of the organization's success lies in the strengths of its people. We must fully utilize their collective experiences and diverse backgrounds to achieve our strategic goals. Looking back at how our organization has changed or grown in the last five years, how have the organization's people contributed to this success?

Thinking about our recent successes:

- Which roles have proven to be critical in the delivery of our mission strategy?
- Will these same essential roles prove critical to our ability to drive consistent results and improvements in our core business processes in the future
- When you think about the roles that will help us achieve strategic success, what are the knowledge, skills and competencies common to those roles?
- What critical competencies and skills will we need to further develop greater supplies of?

Although it is important to staff all of your openings with qualified, dedicated and capable employees,

- Which roles are the most important to fill quickly when they become vacant?
- Which roles require significant training or experience?
- Which skills are unique to our company and not available or translatable to other companies?
- Which skills should we make/buy/rent?

Learning Strategy Implementation

The old adage, "You are what you measure", is very applicable in this case. To understand whether the organization is making progress against the learning strategy, a series of metrics needed is created that not only tells the team whether it is successfully attaining the goals and objectives of the learning strategy, but also drives the behaviors of the organization to that end.

Lesson #3 – Selecting Learning Strategy Metrics

The old saying goes that if you want to manage something, you have to measure it. Learning strategies are no different in this respect. There are multiple perspectives on learning strategy metrics selection to consider. These are planning considerations and should not be considered mutually exclusive from one another.

First, you need to consider whether you can collect the right data and analyze it appropriately to determine progress. So often, learning leaders and their organizations default to what is easiest to collect: a common trap and one in which our learning organization found itself.

Second, metrics should be chosen that can help you quantitatively tell the story of your learning strategy and its impact on the business or mission of your organization. The reason you started this journey was to sustain and create new capabilities for the organization to be successful. For that reason, the metrics you choose should enable you to track progress and tell a story that resonates with stakeholders.

Third, the tendency is to over measure. We identified measures for each of the five goals and 20 objectives. It was too much and unmanageable. Pick a number of metrics that your team can manage.

Learning Strategy Success Tracking

The DIA's Chief Learning Officer implemented a series of quarterly engagements with individual divisional learning leaders to review their fiscal year initiatives that support the learning strategy. These are formatted engagements with a similar framework to allow the Chief Learning Officer the ability to understand progress and barriers that potentially inhibit learning strategy progress.

Lesson #4 – Learning Strategy Progress Sessions

Individual division sessions with the Chief Learning Officer are great starts. The lesson here for our team was to take this a step further and make these Senior Management Team sessions review the overall progress of the organization, while sharing our individual division's status against the learning strategy. This is an important opportunity to look at overall progress of the organization and where office resources can be applied. Common barriers to progress may exist and the ability to share team resources creates a synergy between the team and the goals/objectives contained within the learning strategy.

Key Challenges

The future Federal budget environment dictates that we take a strategic approach to people's investment decisions. To deal with this future, a learning strategy can guide the resource investment discussion and decision making process - if leveraged effectively.

The University of Pennsylvania's Chief Learning Officer program in which I participated recently included a facilitated session on Strategic Execution. During this session, my fellow classmates (including Chief Executive Officers, Chief Learning Officers and Chief Talent Officers) and I identified a number of challenges related to this topic, based upon our collective experiences (see list below).

a. Decision Rights and Accountability
b. Prioritization
c. Incentives
d. Metrics
e. Preparedness/Capabilities
f. Culture
g. Scope Creep
h. External Factors – Uncertainty
i. Communications
j. Clarity & Consensus

k. Authorizing & Reinforcing Sponsor
l. Stakeholder Buy In
m. Transparency
n. Change Management & Resistance

In my experience with developing and executing a learning strategy, there is no single challenge from this list for which you should prepare; rather, be ready to deal with combinations of challenges from different stakeholder groups. You can negate some of them leading up to the learning strategy execution and others must be dealt with during the execution as they present themselves.

What Does Success Look Like?

Success looks like a mission- or business-aligned strategy that guides the activities and investment decisions of the organization. It is a process that starts at the learning leadership level and permeates the learning organization as the vision of what learning can and should be to support the organization's health and growth.

The learning strategy will drive the types of questions we ask of each other across the organization. When we discuss new learning initiatives, the first question we should ask ourselves and discuss openly is whether the initiative aligns to the learning strategy. Then, we should challenge each other to build the business case as proof of that alignment.

Performance management within the learning organization is linked across all levels of the larger organization to drive successful attainment of learning strategy goals and objectives.

Cross-organizational boundaries are made permeable to allow the free flow and transfer of personnel and resources to attack the most pressing learning strategy initiatives. This creates new opportunities to create knowledge and value across the organization as we more efficiently and effectively leverage our collective resources.

What Goes Unchanged?

For the DIA, nothing goes unchanged. We learned valuable lessons from our first learning strategy. Working through how it would be developed, communicated, aligned with performance management and executed all proved to be important aspects to address. Improvement is necessary to succeed.

The Future State of Learning Strategy at the DIA

The DIA is currently completing a new strategic plan. The last one was completed in 2007 and covered the 2007-2012 time period. Past and ongoing major changes have had and continue to have a significant impact on the organization and achievement of its mission. These include an increasingly constrained resource environment across the Federal government, demographic changes as the generational mix continues to evolve and the doubling of workforce size after 2003, which expands global workforce footprint. This new strategic plan provides an opportunity to refresh the learning strategy. It will determine the future value and capabilities of the learning organization that will contribute to the overall mission at DIA.

Keith Dunbar, Defense Intelligence Agency

As a transformational leader in the human capital and talent development field, J. Keith Dunbar has a wide range of experience: from strategic human capital planning and execution to trusted advisor of senior leadership. Currently Keith serves as the Director of the Leadership Academy at DIA. Prior to this role, he served as the Director of the Global Learning Solutions Group at DIA. Keith retired from the U.S. Navy in 2006 after a 21 year career as a Naval Intelligence Officer. He is currently pursuing his Doctorate of Education from the University of Pennsylvania Chief Learning Officer (CLO) program.

Making a Strategic Learning Portfolio the Heart of any Learning Strategy

A Strategy Perspective from Eaton Corporation

Terry M. Farmer, Ph.D.
Evan Ishida, M.B.A.

Introduction

It is becoming difficult to find a learning practitioner who does not believe that organizations should adopt a mix of formal and informal learning solutions to be delivered to learners at their times of need; however, we find that learning functions often have difficulty implementing these solutions due to limited resources, client preferences for traditional forms of learning and frequently having to service ad-hoc requests. Most leaders of a learning function would agree that ideally they could:

- Efficiently and effectively design a mix of formal and informal solutions that enable the business to implement strategic priorities and develop critical roles and work skills.
- Proactively partner with clients to spend their learning budgets wisely by helping them strategically plan for learning solutions that will have the greatest impact on the business.
- Advance the organization toward a more mature "learning organization" by expanding infrastructure and adopting a wider range of learning formats and emerging technology.
- Spend the learning function's own budget wisely by improving the ability to plan ahead for the resources needed to support the business.

The purpose of this chapter is to provide an overview of a learning strategy that focuses on the development of a "Strategic Learning Portfolio" (SLP). The SLP is an idea that is still very much a work in progress, but we are finding it to be a valuable way to support learning in today's business environment.

What is the Strategic Learning Portfolio ?

The SLP comprises six categories and can be thought of as a “portfolio” or “mix” of learning solutions recommended to support the achievement of specific business goals. Unlike a curriculum, which may recommend a collection and sequence of training courses, the SLP is intended to be multidimensional, representing a wide array of rich, dynamic learning solutions that are available “just in time, just enough, and just for you.”

We believe there are a number of benefits to developing the SLP. First, at its root, the SLP is based on the idea that if organizations are going to achieve and sustain the kind of high performance, innovation and breakthrough they need in this crazy, global economy, we are going to have to view and support learning as a *continuous* and *multidimensional* process. The SLP makes the assumption that we need to accelerate the development of employees and enable them to continuously build and refresh their skills. It supports learning through formal channels and informal channels and supports the idea that we will all need to be able to access the right amount of learning: on the job and in a way that is more customized to meet our individual needs and level of competence (i.e., Novice, Competent or Expert). This latter idea is important because it is one of the foundational principles underlying the SLP. We will expand on that later in the chapter.

Another benefit of the SLP is that it helps us make sense of the dizzying number and type of emerging learning tools and solutions. For example, there are e-Learning modules, instructor-led training programs, expert locators, discussion forums, social media platforms, job aids, templates, storytelling, wikis, blogs, articles, podcasting, e-books, action learning projects, collaboration activities, communities of practice, and innovation-type events, to name a few. These are all very exciting and potentially relevant solutions to support learning, but they can be a bit overwhelming to sort out. So, rather than randomly throwing these solutions “over the wall” and hoping for the best, the SLP is designed to position potential solutions within a common framework to give them context, purpose and power. Although the SLP does NOT prescribe specific learning solutions for any of its six categories, it does provide the “canvas” upon which designers can unleash their creativity to design or select those solutions that will work best for their particular needs. The possibilities for the specific types of learning solutions that can be created are endless, provided they align to the fundamental logic of the SLP framework.

Another benefit of the SLP is that it can be used to help gauge the "health" of learning in an organization. Just as a nutritionist might use the Food Pyramid to identify healthy eating by seeing a wide-variety of food groups represented at the dinner table, an organization can begin to identify healthy learning by seeing a wide-variety of learning solutions represented across multiple SLP categories. Seeing only one or two categories of learning is like seeing only cookies and ice cream at the dinner table. Desserts may taste delicious, but feasting on those alone will NOT lead to good health and vitality. Likewise, organizations that feast on a single category of learning (e.g., formal Instructional programs) may not reach organizational health and vitality, even though such programs may also "taste delicious".

We should invest in a diverse portfolio of learning for reasons similar to why we invest in a diverse financial portfolio. Most financial experts would agree that financial assets should not be placed in a single type of investment (e.g., stock). It avoids the proverbial risk of "putting all your eggs in one basket". Instead, it is recommended that investments be distributed across a wide spectrum of investment types so that risks can be mitigated. Then, when high-risk investments do poorly, other more safe investments can do well and vice-versa. The same is true for a "portfolio" of learning solutions across the six SLP categories. An organization should offer a diversity of learning category types and resources so that learning can continue to thrive in strong as well as weak economic times. For example, organizations that have only invested in expensive, instructor-led formal training programs will have little to offer employees when budgets are cut.

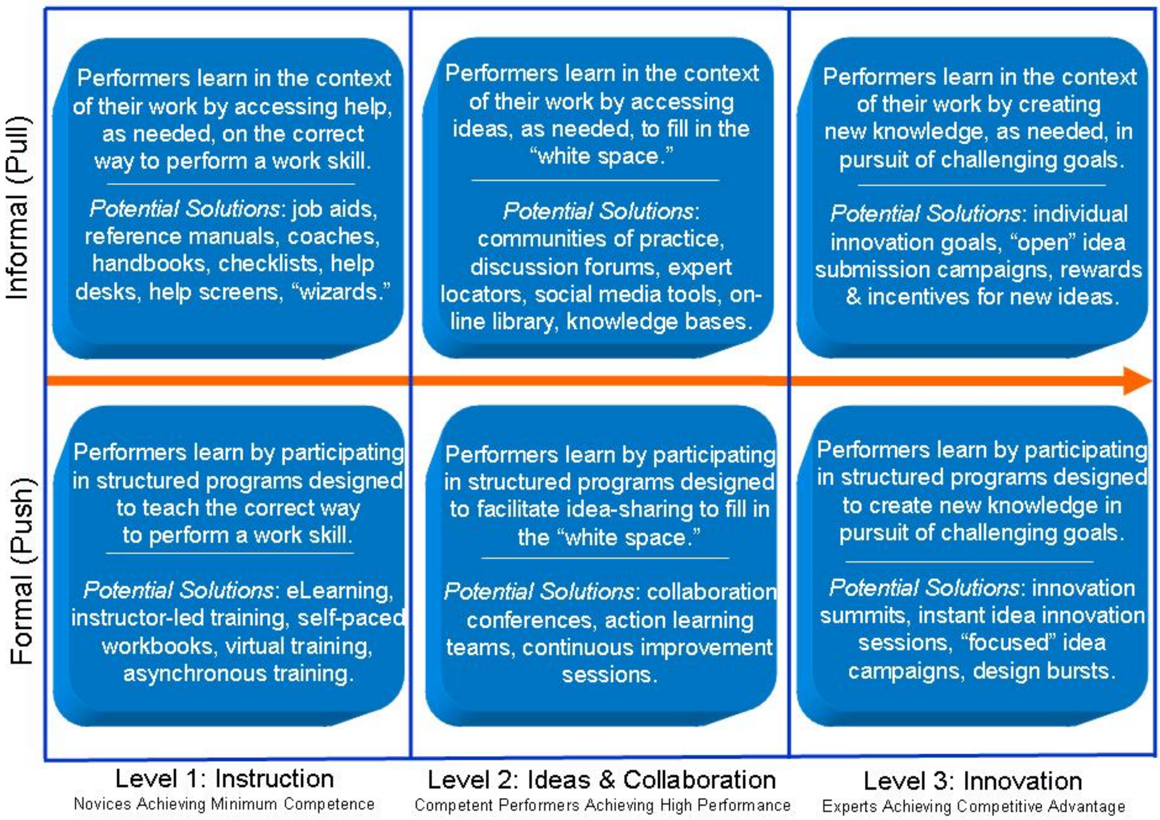
Predominance

Before getting into more detail around the Strategic Learning Portfolio, we would like to first state that the SLP relies on an idea we call "predominance". Predominance helps bring some practicality when trying to apply a new model like the SLP in the real world. It is a simple idea based on the assumption that nothing is absolute or perfect all of the time, especially when dealing with people and behavior. Predominance suggests things that are generally or mostly true (like where people spend most of their time), while acknowledging that there will always be exceptions or outliers. Getting hung up on these outliers will make the practical application of the SLP difficult. For example, the SLP assumes there are different types of learning solutions that are predominately needed and relevant to performers, depending on whether they are Novice, Competent or Expert in a given work area. We recognize that there may be exceptions to this alignment, based on specific circumstances, but that exceptions are just that: exceptions. The SLP assumes that we must understand the predominant needs of performers at different levels of competence so we can support them accordingly.

The Six Categories of the Strategic Learning Portfolio

The SLP consists of two main variables along a horizontal and vertical axis. Along the horizontal axis are the three levels of learning required at three levels of competence. These levels are: Level 1 – *Instruction* (mostly needed by Novices), Level 2 – *Ideas and Collaboration* (mostly needed by Competent performers) and Level 3 – *Innovation* (mostly needed by Experts). Along the vertical axis are the two types of learning formality (i.e., formal and informal). Combining the three levels of learning with the two levels of formality makes up the six categories of the SLP (see Figure 1).

Figure 1: Strategic Learning Portfolio



Vertical Axis:
Formal (Push) vs. Informal Learning Solutions (Pull)

So we will begin with the vertical axis. In order to support learning as a continuous and dynamic process, we have to acknowledge that it can occur anytime, anywhere and on the job. This means we have to acknowledge the informal side of learning as well as the formal side. So what is the difference?

By definition, formal learning means that someone other than the learner is in control of the learning experience at some level. Formal solutions are usually structured in some way and often come in the form of a "program" of some type. It is more of a "push" strategy. Someone other than the learner has determined the content, scheduled the event, or designed the workbook or e-Learning program. Someone else has determined the sequence of content, activities and delivery method. The specific time, duration and location of learning is often determined by someone other than the learner. Formal learning also often involves the process of scheduling, enrollment, registration, coordination, tracking and delivery by a facilitator or mediator.

Informal learning, on the other hand, is learning that is more or less controlled by the learner and usually occurs in the context of real work (e.g., real problems, goals, opportunities). It is more of a "Pull" strategy. The content, design, sequence and manner of learning are usually determined by the performers themselves. They often "pull" knowledge and learning solutions when they need them. Informal learning is what happens when people gather in the break room, at the dinner table or on the golf course. It is learning that occurs when a performer tries something new, falls down and gets back up again. It is learning that occurs by taking on a stretch assignment, observing others, sharing ideas, hearing stories, reading a book, collaborating with peers, solving a problem, or trying to discover or create something that has never been created before.

As we will see, informal learning is usually not directly controlled by a central or external entity. Rather, it is supported by environments and infrastructures in which it can flourish: by providing platforms, tools, forums, processes, applications and incentives so that it can easily take place. This is where the latest tools and technology really come into play. For instance, communities of practice can be created within a virtual shared space for informal collaboration with peers. Wikis, blogs, instant messaging and discussion forums can be made available to foster informal learning. In addition, tools for finding experts (i.e., expert locators), retrieving sample documents, articles, templates, tip sheets and other resources can be provided to foster informal learning across an organization. As we begin to acknowledge, embrace and encourage informal learning as a legitimate part of the learning process (on par with the formal kind), there are endless ways that it can be creatively supported and included as part of the Strategic Learning Portfolio.

Horizontal Axis:
The Three Levels of Learning by Level of Competence

Once we understand that significant learning can occur informally as well as formally, we have found that the learning needs of performers are predominately different depending on their level of competence in a given area of work. Although learning a new work skill is never a straight-line process, we have found there to be a predominate progression through the Novice-Competent-Expert continuum or path. It can be said that all learners embark on a journey as they travel down the path from Novice to Competent to Expert. Although it is clearly an iterative process, and there will always be exceptions, it is a journey that predominately advances forward. Furthermore, we have found that the needs learners have along this path are significantly different depending where they are on the path. These differences are represented on the horizontal axis of the SLP. So, for example, the type of learning generally needed by performers who are new, or Novice, is predominately different than the type of learning needed by people who are Competent or Expert, even though all three groups are continuously learning! It is important that we understand how these learning needs differ by competence level and support them accordingly within the SLP. Here's how the three levels of learning line up to the three levels of competence (Table 1).

Table 1: Levels of Competence Matched to Learning Needs

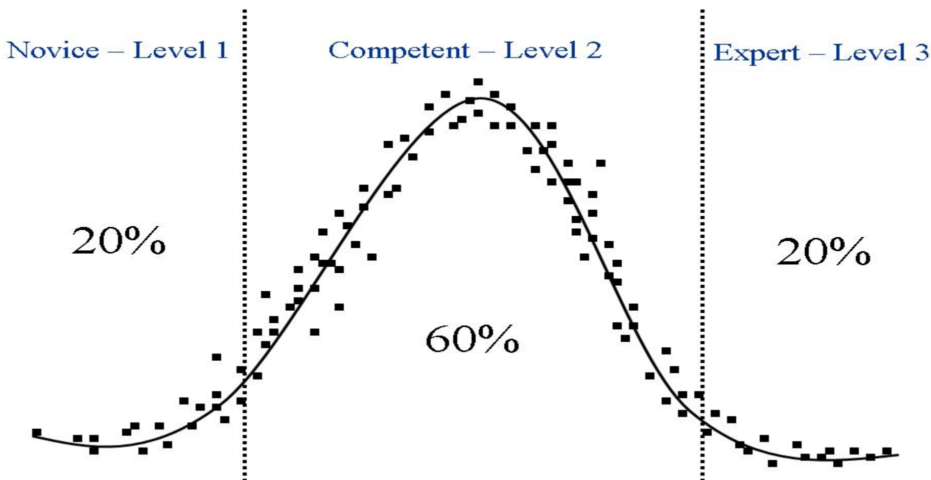
3 Levels of Competence	**Type of Learning Needed**
• Novices	• Level 1 – Instruction
• Competent Performers	• Level 2 – Ideas and Collaboration
• Experts	• Level 3 – Innovation

One trap to avoid is assuming that all we need to support the three levels of competence is to simply provide beginner, intermediate and advanced Instruction. This would be missing the point. Beginner, intermediate and advanced Instruction, is still just that - Instruction. Instruction is only one of the three types of learning needs and is only appropriate when the learner is new or the content is new to the learner. By definition, if people are already Competent or Expert in a particular content area, they don't Instruction for that content.

Another observation about traveling along the learning path is that it tends to be cumulative. That is, learners may periodically "reach back" to previous learning solution types (e.g., Experts may take an Instructional program to refresh on a topic), but rarely reach forward to solutions beyond their current competence level (e.g. Novices rarely participate in a Level 3 innovation-type activity).

If we were to assume a normal distribution of competence among performers in an organization for a particular work skill area, we might expect that no more than about 20% of the performers would be Novice at any given point in time. Another 60% would be Competent and the remaining 20% would be Experts (Figure 2). This type of analysis is helpful in discussing where the client should focus learning solutions, resources and budget for a particular work skill area.

Figure 2: Distribution of Competence for a Random Critical Work Area (CWA)



We can take a closer look at each level.

Level 1 – Learning Through Instruction

Level 1 Learning – Instruction (also commonly referred to as training) is the most common and familiar level of learning. It can also be the most labor-intensive and expensive. Whether it is provided to new employees or to seasoned professionals, Level 1 Learning is needed when skills or knowledge are new to an employee. The purpose of Level 1 Learning is to provide the right, accepted or correct way to perform a task to reach the first milestone along the learning path: a minimum level of competence. Really, in some ways, all jobs and tasks have a “correct” way to be performed. For example, to a certain degree, there is a right way to operate a lathe machine, ride a bicycle, diffuse a bomb, paint a house, operate a cell phone, land an airplane or perform CPR. In addition, there are often correct or accepted company policies, philosophies and laws around ethics, values, diversity and customer service.

Level 1 Learning, although an important part of the overall learning process, is limited in its ability to sustain continuous learning, high performance and innovation. Thus, if Level 1 Learning is all that is being supported in an organization (remember the nutrition analogy), or if it is inappropriately delivered to people who are already Competent or Expert in a knowledge area, there will be limited impact on performance and, potentially, a waste of time and money. Again, the only performers who predominately need to engage in Level 1 Learning are those who have to learn something new.

We often refer to the person who needs Instruction as a “Level 1 Learner” (this is the same for subsequent levels of Level 2 Learners and Level 3 Learners). Level 1 Learners are new to a work skill or knowledge area. They have the need for Instruction and the purpose of this Instruction is to help them learn the correct way to do something up to a minimum level of competence. It helps set the baseline to build standardization, consistency and foundation.

Level 2 – Learning Through Ideas and Collaboration

Level 2 Learning occurs through idea generation and collaboration: generating, accessing and/or exchanging ideas from multiple sources. Level 2 learning meets the learning need that occurs when a performer has already reached minimum competence and is now striving to achieve the next milestone: high performance. Level 2 Learners need to internalize, personalize, assimilate and “substantially apply” the newly acquired knowledge and skills. In other words, Level 2 Learners must apply the new knowledge and skills and make them their own. Again, the purpose of Level 2 Learning is to generate and try out ideas needed to fill in the "white space" or gaps in newly acquired knowledge and skills. Like Level 1 Instruction, there are many forms Level 2 Learning can take. Regardless of form, Level 2 Learning should fill the gaps that ALWAYS remain after attaining a minimum level of competence from Instruction.

By definition, a Level 2 Learner is actually performing in the context of real work. It requires real customers, machines, problems, tools, etc. with which learners can interact. Unlike Level 1 Learning, which often provides a "safe" environment, Level 2 Learning requires real experiences and problems. Real-life failure must be possible for Level 2 learning to occur.

An example of Level 2 Learning might involve a new Claims Representative at an insurance company. Claims Reps often receive the first calls from policyholders who have just experienced some tragedy in their lives, such as the death of a loved one, an automobile accident or destruction of their home. Hypothetically, the Claims Rep may have recently completed a Level 1 Instructional program that included a unit on "demonstrating empathy". One could imagine that she was taught the "Four Key Components of Empathy" and "The 5-Steps to Effectively Relating to People Under Duress" in this Instructional program. It is likely that she engaged in some discussion and role-playing exercises to practice empathy with other participants in the program. Upon completion of the Level 1 program, she returns to the Claims Call Center and begins her job…in real life. As customers begin to call, she finds that there are still too many gaps (i.e., white space) in her ability to handle many of the calls. The specific circumstances, personalities and patience levels of customers are extremely varied. Although she remembers and follows all of the "demonstrating empathy" techniques she learned in the Instructional program, she is finding this aspect of her job to be particularly difficult. She realizes there are many nuances and subtleties related to this skill and that the current range of responses she has available in her repertoire is overwhelmingly light. She sometimes overhears other Claims Reps talking to customers and finds herself thinking, "What a great approach. Why didn't I think of that?" Or, sometimes she will think, "That technique works well for Bill, but I could NEVER pull that off given my personality." The Claims Rep muddles along for weeks, even months, and eventually she builds a larger repertoire of techniques to demonstrate empathy that work for her.

The point of this hypothetical example is that when she returned from the Level 1 Instructional program, this Claims Rep was "cut loose" to begin her job as if the learning process was over. Rather than seeing it as the first step in a continuous, dynamic process that happens mostly on the job, the organization failed to recognize that the Claims Rep's learning journey had just begun when she returned to the Call Center. She had a great need to continue and to be supported in the learning process as a Level 2 Learner but found no Level 2 support from the organization. For weeks and months, she muddled along, listening to cohorts to gain ideas. She may have posed this question to other colleagues at lunch or asked her supervisor for some ideas. Over time, she may have even become a high performer, but in a way that was random and much too inefficient. How many customers were disappointed or angered by their experience? How many took their business elsewhere? How many times did the Claims Rep grow frustrated or want to quit her job? Opportunities to support the Claims Rep were missed. This was because her organization was only supporting one category of learning: Formal Instruction.

Level 3 – Learning Through Innovation

Level 3 Learning occurs through the process of creating new knowledge: through the process of Innovation. At Level 3, learners have not only mastered the skill area or job, but do it exceedingly well. They are often considered role models for others and are often sought after for their expertise. They are the quintessential Experts; however, just because they are Experts, that does not mean they have stopped learning. Unfortunately, Level 3 Learners are often ignored and their learning is not supported by the organization. It is sometimes assumed that they have mastered the job and therefore do not need to be supported in learning. This is exactly the wrong way to think about your Experts. In fact, it is Level 3 Learning that leads to the next milestone: breakthrough and competitive advantage! As already mentioned, it is the assumption of the SLP that learning is a continuous process for all performers. Level 3 learning occurs through the process of creating or innovating. Level 3 Learning occurs when people create new knowledge and new ways to work in the pursuit of challenging goals, problems and assignments. One only needs to think about famous Level 3 Learners, like Thomas Edison or Albert Einstein, to better understand Level 3 learning. In the case of Thomas Edison, there could be little disagreement that he was an Expert in his field as a scientist; yet, he was a continuous, lifelong learner. In the case of the light bulb, Edison knew exactly what he wanted to create (the opportunity goal), but had little idea about how he would create it. After years of experimentation with much trial and error, Edison finally brought his vision around the light bulb to life. He learned much along the way. This is an example of the Level 3 learning experience.

Another example of Level 3 learning occurred through the process of putting a man on the moon. In the early 1960s, President John F. Kennedy set forth the challenge to put a man on the moon by the end of the decade. At that point, no one really knew exactly how this would be accomplished. After years of research, experimentation, collaboration and even some tragic failures, Kennedy's vision was realized in July of 1969. During all of this time, as with Edison before, the scientific community learned a great deal. Again, that was Level 3 Learning. In fact, some of what was learned through that pursuit led to other breakthroughs and technological innovations, completely unrelated to the man-on-the-moon goal.

Innovation Learning, or Level 3 learning, meets the learning need that occurs once a person has achieved a level of high performance within a specific area of knowledge or skill. At Level 3, learners have a great need to learn by creating and innovating. The process of Innovation itself is the learning experience for the Level 3 Learner.

One more word on Level 3 learning: when people think about innovation, they often think of those involved in the development of new products. They usually think of engineers or product designers, but innovation can and should occur within all functions. Finance, Sales, Human Resources, Legal Departments, Marketing, Information Technology, etc. all provide products and/or services developed by leveraging the innovation process. There are infinite breakthroughs waiting to be discovered and new knowledge to be created in every function, but the organization must acknowledge, expect and support this Innovation Learning process.

Building the Strategic Learning Portfolio

So, how do you build and populate the SLP?

Building the SLP is a creative endeavor; however, like any effective learning strategy, the SLP begins with a clear understanding of the business strategy. Determining the mix of learning solutions represented in the SLP will ultimately depend on where the business is headed. What are the business strategies, goals and objectives? To have this understanding, it is always important to build and manage strong relationships with your internal executive clients. They are the ones who will not only communicate the needs of the business, but will also help prioritize and determine what matters most for inclusion in the SLP. They will also help you identify your subject-matter experts (SMEs). The SLP should be renewed on an annual basis, but usually represents solutions that need to be implemented and made available over period of 2 or 3 years. This means that solutions must be prioritized. Because budgets are always limited, the SLP should be carefully targeted and built to achieve those business priorities that will have the greatest impact. It is important to note that business goals may often reflect the pursuit of new opportunities or achieving something that does not currently exist (e.g., growth in a region, building market share, developing new products). Remember, the SLP framework fully supports the creation of new knowledge through Level 3 Learning, so it's important to proactively work with your clients to call out and consider these types of opportunities.

Once the business strategy is clear and targeted business goals have been selected, it will be important to identify those key processes and roles in the organization that will have the most impact on the business goals. In other words, you will need to identify those processes and roles (jobs) that will most directly lead to the attainment of the goals. Is it Controllers in Finance? Sales Managers? Engineers? HR Professionals? Materials Managers? Is it a combination? Note: it is beyond the scope of this chapter to delve into how to conduct a process or job-level analysis to sort out learning from non-learning solutions. It is assumed that those conducting this initial analysis will be Performance Consultants who will apply the tools to sort out all of the potential variables that may have an impact on achieving the business goals (process, structure, measures, incentives, etc.). Obviously, the SLP centers on the learning solutions that can be applied to support the business goals.

Once the key roles have been identified, the "critical work areas" (CWAs) that comprise these roles will need to be identified, prioritized and analyzed. CWAs are simply a grouping of work tasks required to perform a role. There may be technical or functional competencies for each role. SMEs can help identify and document these CWAs. There are usually about 10-12 (plus or minus) CWAs for any key role, but they will not all have equal impact on goals. For instance, a General Manager role may include the CWAs of "Develop a Strategic Plan," "Create a Budget," "Manage Metrics and Scorecards" and "Make Effective Presentations." When compared to the business goals, the CWA of "Develop Strategic Plan" may be selected as the most impactful versus the others.

Once the CWAs for the targeted roles have been selected, each will need to be analyzed to identify the supporting skills, knowledge and specific behaviors expected at the three competence levels (Novice, Competent and Expert). This can be done working with SMEs representing the CWAs. It is important to document the expected behaviors at the three levels of competence so that current performers (the audience) in the key roles can be assessed against them. Once the behaviors have been defined at each level, facilitated sessions can be conducted with clients and SMEs to review the CWAs. Gather their input on current capabilities of performers. In addition, an Audience Analysis Survey can be given to a sample of the target performers to gather self-input data on their levels of behavioral competence. These activities will provide you with a curve representing the distribution of competence.

We also recommend conducting a Work Environment Survey of the target population to gain a sense of the current realities of the performers' work environment. This will help drive decision making on whether solutions can be formal or informal. For example, the survey would gauge the availability of time for off-the-job learning activities, time-to-competence requirements, cultural preferences for virtual vs. face-to-face, and the extent to which the work environment promotes sharing, collaboration and innovation. Also, factors such as urgency, complexity of work, as well as risk and safety issues can help determine whether a skill area can be learned formally or informally.

Determining the Mix

Identifying which solutions should populate the SLP should be done with a practical approach that involves input from your clients and SMEs. At this point, you have the information you need to build the portfolio:

1) Business Strategy and Goals
2) Prioritized Critical Work Areas/Competencies Required for Key Roles
3) Distribution of Competence Levels in CWAs for Key Roles
4) Analysis of the Work Environment

With this information, the learning professional should be able to recommend appropriate learning solutions based on type of formality and level of competence. The business goals, input from your executive clients and SMEs, and your *real* budget will ultimately dictate the priority and distribution of solutions across the six categories. For example, if the business is more focused on the pursuit of new opportunities within a particular goal, then more resources and learning solutions may be focused on Innovation activities for Experts for the current year, with plans to support the Competent performers in a less expensive way (e.g., creating a Community of Practice). Then, perhaps in year two, the organization will focus more resources on Competent performers with Level 2 solutions, such as a series of face-to-face Collaboration Conferences. As mentioned, it is recommended that the SLP (as with any strategic plan) be renewed every year and a new Audience Analysis conducted to recalibrate the distribution of competence. The SLP would be recalibrated accordingly.

Obviously, the fully detailed process for creating a Strategic Learning Portfolio is not fully represented in the chapter, but we hope our contribution will promote discussion and provide a case for creating a multi-dimensional Strategic Learning Portfolio for your organization and clients.

Terry M. Farmer, Ph.D., Eaton Corporation

Terry currently leads Eaton University for the Eaton Corporation, headquartered in Cleveland, Ohio. Prior to Eaton, Terry was Director of Training and Performance Improvement for Nationwide Insurance in Columbus, Ohio. He also worked for the Walt Disney World Company in Orlando, Florida as a part of their Organizational Development team and for Rubbermaid, Incorporated headquartered in Wooster, Ohio in their Human Resources Development department. Terry began his career with Ernst & Young in Cleveland, Ohio as a manager in their Professional and Organizational Development group. Terry holds a Masters and Ph.D. from Indiana University in Instructional Systems Technology.

Evan Ishida, M.B.A., Eaton Corporation

Evan is currently the Manager of Performance and Learning Consulting for Eaton Corporation. This team consults with internal clients on a global scale to identify learning and performance needs, designing strategic learning plans, and designing strategic learning solutions. He has consulted with and managed projects in the areas of Leadership Development, Manufacturing, Sales & Marketing, Engineering, Environmental Health and Safety, and Information Technology. Evan has 8 years of experience in the Learning and Development industry. Prior to Eaton, Evan worked for Nationwide Insurance in Columbus, OH focusing on Claims & Sales Training development as well as process improvement.

Setting Learning Strategy: Technology is Key…When You Use it Well

A Strategy Perspective from Farmers Insurance Group

Mike Cuffe

When my colleagues in corporate learning respond to a MASIE Center *Classroom of the Future & Classroom of 2011* survey by focusing their answers on the physical classroom - how it operates today and how it is likely to change - I find myself asking, "Why are we focusing so much on the characteristics of the physical space in which learning takes place and so little on how we will use technology to facilitate our interactions and drive the learning process, wherever and whenever it might occur?"

If you ask me, that should be our strategic focus.

Whether people in my organization are learning alone or in groups, online or in a physical classroom – all of which they do at one time or another – the physical environment in which they learn is not the primary issue.

Do not get me wrong: that environment matters deeply. One of the most important outcomes of establishing our new University of Farmers campus in Agoura Hills, California five years ago was the sense of pride it engendered in our entire workforce. The minute you walk through the front doors and across the lobby floor – where our university logo is proudly embedded in the tile work – it is clear that we take our employees' education seriously, and that we approach the learning process with professionalism and a focus on quality.

But beyond the message that facilities can deliver to our workforce, the bigger issue is technology: how our learning professionals employ it to engage people and help them learn.

At Farmers Claims, we call ourselves a values-based, performance-driven, learning organization. We consider learning to be a continuous, daily process: not just a task to check off on our annual to-do list. That may be why we never worry about maximizing the use of our

University of Farmers classrooms, which are hardly ever empty and usually reserved months in advance.

So is our virtual learning calendar. Whether employees are enrolling in self-directed courses through the University of Farmers Online, attending training meetings in field offices, participating in ride-along observations in the field or engaging in one-on-one coaching and mentoring sessions with a manager, supervisor, trainer or learning partner, it all adds up to a lot of learning. In all of these settings, we are working to bolster the learning experience by strategically employing technology. For the University of Farmers, technology is key.

We bring new hires to the U for their fundamental learning sessions as claims representatives. Throughout their careers, we bring them back for intermediate, advanced and specialty learning programs, as well as for our comprehensive series of leadership programs, most of which take place at the U. Each course they complete is carefully designed to develop their technical competencies, their interpersonal and leadership skills, and their readiness for advancement. Courses are part of a comprehensive learning program, which combines coursework, field experience, coaching and mentoring, and high-stakes certification and testing at every key juncture in our learners' careers.

But even when our employees are working in one of our six campus locations – Agoura Hills, Grand Rapids, Kansas City, Kans., Oklahoma City and Lake Mary, Florida – they spend less time sitting at a classroom desk than they do in our learning laboratories. These include a two-story mock house constructed right inside our main campus building, a fully functional branch claims office, a 20-plus auto bay area stocked with a rotating assortment of damaged vehicles, along with "habitats" for learning about manufactured homes, recreational vehicles and boats.

Home base, operating arena

Our students use the U's classrooms as home base and our experiential learning laboratories as their primary operating arena, with technology linking the two. Our instructors spend less and less time each year orating from the front of the room, and more and more time consulting with students one-on-one or in small groups, whether live or via technology.

When we built our new University facility nearly five years ago, we upgraded the functionality of our old facility's classrooms by acquiring movable furnishings and installing smartboards, multiple displays, camera capture and presentation recording capabilities in every classroom as well as in our learning laboratories. But that was just Step One in our technological evolution.

We quickly added video capture capability to our auto bay area so that our instructors could take a group of 30 people simultaneously under an auto wheel well or inside an engine. Instead of 30 people taking turns to see what an instructor wants them to see – and instructors repeating themselves 29 times – everyone sees the vehicle damage at the same time and shares their observations in real time with the entire group. Additionally, that demonstration can be captured as it occurs for later viewing on demand, whether by the original 30 students or other learners.

We then began equipping our classes with iPod Touch units, placing some in the learning laboratories and some in classrooms. Students can now work on claims investigations and estimating assignments in the mock house or auto bay and post questions via iPod Touch, along with images of the damage they are trying to assess for their instructors. They, in turn, can then respond immediately without ever leaving the classroom where they are grading exams or prepping for the next day's class.

We also began using eClicker technology in classrooms and labs to conduct on-the-spot assessments of our students' knowledge acquisition, enabling them to provide focused, anonymous feedback on course content, learning activities, instructor performance and more. This was not just a cool new way to use our touch screen tools: it also made great business sense. Instead of spending thousands of dollars updating our four-year-old auto-response technology system, we put the same functionality in our learners' hands for the price of a 99-cent app.

In addition, we have begun using iPads as "course notebooks," pre-loading learning content for the course in question and uploading apps that enable participants to take notes directly on the course content pages so they can e-mail them to their own laptop computers for retention. It is not just a highly efficient way to deliver up-to-date course content: it also honors our company's efforts to “green” our operations by reducing the amount of paper-based material we produce and distribute.

We confirmed this approach in our new Presidential Leadership Program – one of four programs in our leadership development curriculum, which launched in February 2011 – by employing an all-green curriculum delivery system. Not only does PLP eliminate paper as a content delivery and recording tool, it also electronically links our learners to technology at the Ronald Reagan Presidential Foundation and Library in Simi Valley, CA where PLP sessions take place. In that rich learning environment – where learning laboratories exude leadership – participants learn about emotional intelligence, personal health and well being, and their impact on inspirational leadership.

We are now taking those concepts back to the University, where the PLP experience has fast-tracked our app development and iBook learning curve, and positively impacted our efforts to design Claims curricula in new, engaging and more environmentally sensitive ways.

At our Grand Rapids, Michigan learning facility, where employees who handle our specialty products claims learn their jobs, we have installed touch-screen kiosks in our manufactured homes, where learners complete self-directed studies of water, fire and other loss types. Each kiosk presents branching scenarios for the loss type, enabling the learner to “ask a question” of the customer and, based on the customer’s “response,” choose their next action. It is on-demand, trial-and-error learning in a safe environment with a virtual coach providing immediate feedback.

As we planned our new Grand Rapids campus, which opened for business in late spring, we incorporated wiring for learning kiosks in each of the key product line habitats – manufactured home, recreational vehicle and boat – to extend the use of that learning technology.

Information anywhere, anytime

Starting in mid-2010, we conducted a smart phone pilot that ran for nearly a year to determine whether the enterprise should make smart phones standard equipment. If so, what tools and technology could and should they contain? The pilot convinced us not only to start acquiring smart phones as current phone contracts expire, but also to use those phones as replacements for several pieces of equipment that our claims representatives (CRs) take with them in the field.

Now, as our CRs' phones are replaced, they will start using smart phones in lieu of laptop computers, cameras and measuring tools. They will send and receive e-mail, take scene and property photos and video recordings, scan customer receipts and other documents, obtain measurements of damaged property and record customer interviews using smart phones. A proprietary claims application will enable them to upload documentation, including photos, that they gather onsite directly to the customer's file in our claims management system. They will travel from one appointment to the next using a GPS app loaded onto the smart phone.

If claims representatives comes across a damage situation that is unfamiliar or they need to repeat a process they last did several months ago, they will be able to view a learning "nugget" on that subject on the smart phone screen, rather than having to call a supervisor, trainer or fellow CR in the hopes that they are available and have the answers the field CR needs.

Big audiences, big messages

Then there are the times when we must reach large groups of employees, often quickly and always with a consistent message. Whether for an enterprise meeting or celebration, or for rapid mobilization in response to a natural disaster or other catastrophe, these are the times when our video studio classroom and videoconferencing, webcasting and podcasting capabilities become indispensable.

We use videoconferencing, webcasting and podcasting to reduce or eliminate the need for employees to travel for meetings and learning sessions. This saves money and time, boosting our efficiency, which helps our employees maintain their focus on taking care of our customers.

We use our video studio classroom in two ways:

- to shoot scripted and documentary-style learning and communication videos for production and distribution.

- to live-cast real-time streaming video two-way sessions for dispersed employee teams and learner groups, or to mobilize and communicate with teams deployed to field locations in response to natural disasters and other catastrophes.

Each use offers us multiple options for creating and delivering mission-critical communications and learning content. Each supports our commitment to deliver exceptional customer service in even the most challenging times.

We also have installed video and big-screen display systems in our University and claims unit buildings – in hallways, work areas and break rooms alike – to deliver communications that reinforce the corporate culture, vision and behavioral messages that Farmers employees start hearing from the day they first apply for a job. Those display systems are where our employees can get a quick report on the latest business news, find out what is going on in their local communities, view "quick bite" modularized training tips that help them do their jobs and receive public recognition for a job well done.

Matching technology to need

The greatest challenge we seem to face in terms of technology deployment is not one of support from the Board Room for our acquisition requests. Nor is it one of employee willingness to learn and employ the new technologies we put before them. Rather, it is a matter of ensuring that technology is deployed when and where it works best – not just because it exists!

When we first started building online learning with avatars, for example, our instructional design team quickly found itself inundated with requests for content builds that used avatars, even if the learning module was used to teach employees about a computer system process by walking them through computer screens one by one. We needed to educate our content requesters about the most effective use of avatars. Examples include to build learning content for the purpose of helping improve interactions between customers and claims representatives, or CRs and auto repair facility technicians, or supervisors and employees.

The same thing happened when we began building video components into our curricula. Suddenly, everyone wanted every course to include video. The more dramatic, fantastic and production-value-intense, the better! We needed to educate those requesters about when video is most effective, how it should be designed and when it is not the best response to a communication or instructional need.

The same was true of our smart phone pilot. Smart phone technology can do many things, not all of which are mission-critical or cost-effective. We needed to carefully consider all of the options that our pilot users identified and recommended, and focus on the capabilities and features that will best enable our employees to do their jobs better and more efficiently, giving them more time to focus on our customers and their unique needs.

The objective in all that we do with technology is simple: we seek to use technology to streamline, systematize and synchronize the learning and collaboration opportunities that will help Farmers employees do their jobs better.

Impact on the business

How does the University of Farmers' focus on technology help drive business results?

It enables us to easily and cost-effectively touch every single Claims employee every year, delivering learning where, when and how it is needed to boost both technical performance and customer service. In the first quarter of 2011 alone, we welcomed nearly 1,700 participants to instructor-led sessions, recorded nearly 120,000 webinar enrollments and more than 25,000 individual enrollments in University of Farmers Online learning offerings. For a total Claims employee population of 12,500, those are pretty impressive learning engagement numbers.

And we continued to deliver outstanding results to the enterprise. In the first quarter, our claims representatives racked up an average 94.81% quality assurance rating (measuring the accuracy and efficiency of their claims handling) and an average 92.4% customer satisfaction score. I believe that those results confirm the wisdom of management's decision to embed the University in our operating unit structure, rather than in the

Human Resources Department. That keeps us close to the business and keenly focused on the bottom line.

At the University of Farmers, we consider technology the means to an end: not an end in itself. When properly and effectively deployed, technology makes it easier for our instructors to teach, easier for our employees to learn, easier for them to deliver exemplary service to our customers and easier for our customers to restore their lives and livelihoods when an accident or natural disaster has torn their world apart.

It is no surprise that the Farmers executive team chose to feature a fictionalized version of the University of Farmers in our current advertising campaign. The message of that campaign is clear: our learning brand is a key component of our corporate brand. It tells employees, agents and customers alike that Farmers is a place where people do not just come to do a job and earn a paycheck: they come here to learn and to use that learning to serve our customers and the communities where we live and work.

So when we talk about learning strategy, we look at three things: learning needs, learning impact and learning efficiency. The way we develop our resources is a living embodiment of our strategy. By becoming ever more efficient, impactful and customer-centric, we help Farmers reach its targets and boost its standing, both in our customers' eyes and in the hotly competitive insurance marketplace.

Mike Cuffe, Farmers Insurance

Mike Cuffe joined Farmers Insurance Group as Director, Claims Training & Education, in fall 2005. As a result of his visionary leadership, Cuffe was promoted to Assistant Vice President, University of Farmers, Claims, in January 2007, and to Vice President in June 2008. Before joining Farmers, Cuffe was Executive Director, Learning and Performance Systems at J.D. Power and Associates. Earlier management posts included training and human resource development assignments at Groupe Schneider/Square D, B.I. Performance Systems, and Wilson Learning/Pecos River. He also managed total quality research and training programs at the Minnesota Quality Council.

The Dynamic Strategy Relies on Insight - Not Planning

A Strategy Perspective from Lloyds Banking Group

Peter Hallard

Learning Leaders who devote their time to the development of detailed learning strategies are destined for a lifetime of disappointment as they discover, time after time, that once they have created, agreed, signed off and funded their strategy, the world around them has moved on. Once you have written the first version, it is already time to start the re-write and create the second version. Before the second version is finished, the third is necessary and so it goes. This process of constant revision is like trying to stop time. It is no longer possible to freeze the moment long enough to get it all down on paper. And if you do, then the completed strategy is no longer relevant. It is like driving down a windy road: it is always best to concentrate on steering, forget about working out the miles per gallon or the average speed. Sticking to the road is demanding enough!

The world has changed since the 1990s. In a less volatile environment, it was possible to do detailed mapping and alignment exercises. The focus was on the alignment of the curriculum to declared business objectives. Start with your business strategy, find the divisional objectives and then start to map capabilities. You then map learning outcomes and develop your aligned curriculum with evaluation designed to track the outcomes back to the divisional strategy. All very neat and very coherent, but it was an 18 month journey. Even then, it was often pinned to the business strategy that had already moved on. Some of our learning colleagues with a particular penchant for spreadsheets may have even drawn reluctant communities into their web of “demand planning”. Show me a demand plan on a spreadsheet for any organization of even modest complexity and I will show you something that is, at best, almost wholly inaccurate!

Even in those days, there was a real dilemma: the cycle of aligning to business objectives followed by detailed curriculum planning followed by learning design and checking and rechecking was slower than the pace of organizational and environmental change. Curriculum could not be hurried, nor could the planning process or the learning design, and everything was linear. One step at a time. By the date of the perfectly executed program launch, the reaction was a muted, "so what?!" The moment that defined and determined its execution had long passed. But there were no better ways. There were few other models and the time dislocation was tolerated. Just as John Wannamaker, the American department store magnate, is reputed to have said many years before about another kind of investment, "I know that half the money I spend on advertising is wasted. The problem is, I don't know which half," there was an assumption that learning was good for you but the impacts were complex and unable to pin down, so the investment continued and the effectiveness was never a critical issue. Some mud stuck at some time for some people, but the why's and wherefore's were too complex to try to analyze or define.

But now, the rate of change in our world has increased exponentially and successful learning is more about speed and agility based on *insight* – not planning. Let me just pause for a moment on that word in italics: *insight*. It is important that I clarify what it means. Here is my definition:

Insight: the act or outcome of grasping the inward or hidden nature of things or of perceiving in an intuitive manner.

That is a very important definition: learning in organizations should focus not on what *appears* to be required or on what you are told is required, but on what is actually required. And the way of discovering this can only be achieved by having a deep grasp of the organization and what it needs. Insight can only be achieved through profound engagement and deep knowledge. This is, in itself, almost a strategy for learning. Being a learning leader is not like watching a television program of your company where you sit back and analyze but are engaged: it is more like making a movie of your company. You are in the middle of the action, trying to make sense of it, and you help shape that movie in a serious and profound way.

To illustrate this, I want to look at two processes. The first is taking a short term view (i.e. over the next 3 months) and then contrasting it with a long term view. By long term, I mean 8 months, because 8 months is the new long term in learning in this volatile and complex business environment!

Short Term: How do we align our learning resources to business needs and build a short term strategy?

The best example of how to go about this is demonstrated by one of the world's most successful retailers and supermarket chains (after Wal-Mart). Tesco is the UK's leading supermarket brand, visited by over twenty million customers a week. It has now branched out into selling mobile phone plans, insurance, holidays and even used automobiles. It has its own bank and its own branded credit cards. Tesco is even planning to build whole communities, rather than just supermarkets, and selling the housing by loaning the mortgage money for the purchases. Indeed, its plans to expand into banking are challenging the whole retail banking sector in the UK.

Tesco is successful because the company uses customer insights, trends, data and its own expertise to know what customers want, as well as what customers do not know they want – but will want when they see it. Tesco also knows how many of “x” customers want and when they want them.

Do they write to all of their customers and ask them how many burgers they will be buying in the first weekend of July? What would be the point of that? The customer has no idea as it depends on a number of variables, not least of which is the weather on that date. What Tesco actually does is use the mass of data available from customer loyalty cards and cross reference that data with the long range weather forecast. This gives them a pretty good indication of whether the barbeques will be out over that weekend. Then they will use historical data and scan the media to see if celebrity chef Jamie Oliver is using coriander or cumin in his burger recipes this month. So, go into Tesco’s in the first weekend of July. Go to the fresh meat counter and I promise you that if the sun is shining, you will be looking at a fine selection of the most fashionable burgers that are ready for your grill, probably with both cumin and coriander! Even though the customer only made the decision to purchase burger patties half an hour before turning up at the supermarket, Tesco has already anticipated that demand and catered to it.

The analogy fits learning just as well. When we need speed and agility in our learning offerings, we cannot go to our customers (the business) and ask them to tell us what they want. As learning experts, we need to make this our problem. We need to find our equivalent of the Tesco model and refine it to be as sophisticated as Tesco's planning process.

- Where are you getting your customer data? Are you really mining your LMS data effectively to give you real-time information about what your “customers” are telling you?
- What is the short term weather forecast for your business?
- How are you tracking the trends and fashions that move your learning product range forward?

Here then are the challenges and the culture change for learning leaders. They are not going to give you your typewritten, short-term strategy, but they will help you sharpen your insights and intuition, and help you use your expertise to move your learning offerings forward with speed, agility and, of course, relevance.

Long Term: The demands of looking further ahead

Now, if we think a little longer term, we are going to have to think a little differently again. Now is a very good time to stop asking your business or customers what they need. It is time to *tell* them what they need. We need to move the learning profession into the realm of the business-critical consultant. In recent years, our world has moved on from learning portfolios and learning catalogues (I use the term in the very broadest sense) that are essentially legacy documents. Their existence in the present is almost by accident rather than by design. There is an old football terraces song in England with the lyrics:

"We're 'ere because we're here because we 'ere because we're 'ere."

In other words, we are here because we have always been here and we are here to stay. Some learning catalogues are a bit like that! Nothing disappears: things only get added year after year after year.

We have all tinkered around with the curriculum year after year without changing the fundamentals, and we have introduced the technology that is placing the creation of at least some content in the hands of the learners themselves. This is all well and good, but it does not lead to fundamental change. When you couple this with the model of the learning leader as “humble scribe”, we have a recipe for inertia.

The humble scribe model is the learning leader who goes up to the heads of the business and politely asks them what they want. Time and time again, the leaders of our businesses tell the learning functions what they think they need. They are, after all, the smart decision makers in the business. They are the leaders. Is that not obvious? The business leaders’ confidence is increased by virtue of the fact that they have been on a few courses in their time and they think they know how best to maximize the potential of learning for their area. Well, the simple fact is that they do not necessarily know how to do this and their views are only one set of data to take into account. To rely on them as your only source of data is not smart. In fact, I think that we have been too subservient to senior leaders’ requirements for far too long: just because the demand comes from a senior member of staff, then it must be right and it must be obeyed. We dish up the past, based on erroneous data from people with only half an eye on that particular aspect of their job. It is a recipe, if not for disaster, then for a waste of effort and a distraction from the real task in hand.

We have changed the model in my business (banking) in a profound way, and there will be no going back to the old model. Learning used to take its requirements from the business, which, in turn, took its requirements from the end customer. This presupposes that the business knows best how learning can drive end value to our customer and how to articulate that need in learning terms. Wrong on both counts!

We need to look at it the other way. Learning must engage directly with the end customer and we then determine how best learning can add value to the business. The learning department uses its well-informed insights and expertise to ensure that the output sets the direction for learning and retains control of the learning agenda in the business. Just as a marketing strategy is the jurisdiction of the marketing department and based on data, vision and trajectory, so must learning not be based on staff telling the learning function what the customer wants. Instead, it should be based on data and insights in a way to enrich the dialogue about the company and its trajectory in the eyes of both staff and customers.

There are three essential conditions for this to happen:

- There has to be trust between the learning team and the senior business leaders.
- There has to be respect so that the senior staff recognize the specialist expertise of the learning professionals.
- There have to be resources so that the learning team can simply get on and do its job.

It does not matter if you are building a short term learning strategy out of a longer term one or vice versa. There are five basic tenets to follow that all hold good:

- Base your decisions on data - not on opinion
- Trust insight
- Rapidly revise as circumstances change
- Act like the professionals who understand learning and own the learning strategy
- Base everything on a profound knowledge of the business, its staff and the current economic climate and marketplace

For some learning teams, that is a big change from the status quo, but it is a move that many have already made. It is far better to drive into this position than be forced into it at some point in the future. The essence of that shift is about raising the bar for learning. It's about being prepared to live or die by the learning results and their impact on the business. It's about raising the status of the learning leader to that of a trusted expert with an area of expertise that is equal to and of similar impact to other areas of expertise in the business.

Peter Hallard, Lloyds Bank

Peter has developed a wealth of Learning and Development experience across a broad variety of market sectors. His first L&D role came as Vice President for Training for the global telecoms company Marconi. He then turned his attention to the Media sector with the roles of Head of Learning for the BBC and then Director of Learning and Organisational Development for one of the UK's largest commercial broadcasters, ITV. He now works in Financial Services as the Head of Learning for the retail banks within Lloyds Banking Group.

On Learning Strategies

An Interview with Elliott Masie

To start off, what is a learning strategy? And, why should a learning organization should develop one?

I see a Learning Strategy as the ultimate focusing mechanism for, not only the learning organization, but for the overall enterprise's commitment to learning. Secondly, the Learning Strategy must be aligned and connected to the overall corporate or organizational strategy.

For example, in a sales organization, the goals may be to have a great product that is marketed and sold well and achieves great customer satisfaction, so then the learning strategy essentially needs to map to those goals, support them and be measured against their related success.

Learning Strategies can be our private and public GPS to make sure that the learning resources are being invested in ways that support the success of the workplace and the organization.

Some see a learning strategy as a "process" while others view it as a "document," which is it?

I actually believe it's both!

The process piece of building a learning strategy is amazingly important. It clarifies the values and focus of what "we" want to achieve. The "we" needs to be business leaders but must also include the learners themselves. I believe that we can and should include suppliers and partners in the process.

We have to make sure that the process is rigorous, engaging, has contrarian views and at the same time is done in a way that leads us to an actionable document. I have seen some great learning strategy documents that do not reflect much of an in-depth process and as a result almost always fail.

The document itself is also important! Some of my colleagues will say that it's all about process, but the document is used to align, to target, to evaluate, to assess, to market and to gain resource support.

You must get the process right, and in the end you need to build and create a document that is a living, breathing reflection of that strategy.

As learning organizations go through the process of developing learning strategies, how should they think about innovation?

Our mantra these days is 'balancing learning.'

It is important that leaders question how they can blend together that which is working with innovation, or that which is new or different. New and different can mean things that are cutting edge because they were just invented yesterday, or new and different can be things that have been around for a while but have just not yet been tried yet. Sometimes innovation is going back and trying something you did from 2 or even 25 years ago and now trying again and doing it differently.

The process of building a strategy provides the important opportunity to ask:

What are the affordances that these new things provide?

Affordance does not mean if the organization can afford it financially, but rather what are the new capabilities provided by the innovation. Do they allow for content to be provided faster or more conveniently? Do they allow for the integration of learning and work?

So let's use an example. My team and I are intrigued by tablet computing. I have six different tablets here at the office (from the original iPad to the HP Web Tablet). Recently, I have been spending more time with a tablet than I do with my laptop or my PC. I would not suggest that somebody build a learning strategy that says 'everything to the tablet' because I am not sure that you can do that yet.

On the other hand, it would be really appropriate for us to look at the innovation of what tablets may provide as e-readers, as performance support platforms, as communication platforms and as mobility-based elements. Through experimentation, we are going to figure out some interesting ways of taking the affordances of an innovation such as a tablet computer, and integrating the technology with something we have done for decades, which might be leader development, new hire orientation or maybe safety training.

It is ultimately about avoiding the hype. And boy, it is most fun to talk about all the cool new stuff, but there is a responsibility of the learning leader who is building a strategy to balance the affordances with what is known to work. Together, you end up figuring out how to incrementally improve the quality and the impact of all the learning efforts.

From the learning leader's perspective this raises an interesting challenge, namely getting to an appropriate balance between the existing and the new. What other challenges would you hold up for learning leaders to be aware of as they build a learning strategy?

Learning leaders, first of all, need to have a variety of comparative resources to help them with this process. In particular, it's really important for them to look outside their organization to benchmark, with both similar and dissimilar organizations. For instance, professionals in the food service industry ought to look at the pharmaceutical industry, or look at the travel industry or look at an engineering industry. It's still also important for everyone to explore what other companies in their own space are doing.

Another thing that learning leaders need to do is be aware of the marketplace. They should develop their own radar screen around innovation. Part of the learning leader's role is to visualize on a radar screen where innovation is occurring and look at what is coming into the marketplace or possibly expiring. It's a time to look at where the organization is in terms of the, to use the Gartner group's term, 'hype cycle.' The leader should be aware of the half-life of a learning system as to not wake up one day and suddenly say, 'gosh, our LMS doesn't work.'

One of the targets a learning leader should aim for is creating a culture that encourages talking about, but also supports experimentally engaging with, these innovations. Leaders should understand their interaction with the innovations: whether they are liked, if they work, and if they are ready for prime time yet. And so, building your own internal learning culture within the learning organization is imperative and not done as much as we would imagine.

Another challenge learning leaders face is bringing the strategy to life. In other words, having buy-in for it. How should they go about getting buy-in?

In most organizations, the learning strategy is at most 15% of a change from where they were, and that's an important piece to recognize in getting buy-in. It usually encapsulates what is already being done and then makes some changes. So, this needs to be realized and articulated.

Leaders should be cautioned not to oversell the strategy. Sometimes people look at the strategies and think, 'we won't know learning as we knew it anymore when this strategy comes out.' There are still going to be courses; there are still going to be eLearning initiatives; there are still going to be trainers; hopefully a whole lot of other new content and focuses will be added, but we have to try not to oversell them.

Also, you want to see in the strategy the contribution of the groups that were part of building it. Leaders might want to include everything from quoting stakeholders to being very specific in providing exemplars.

Finally the strategy ultimately has to have a second component which is an action plan to show how it will be implemented. Provide an action document that actually takes people step-by-step through how we are going to make this strategy real! And that action plan can be a 360 one and answer the questions, for example, what will be different for the manager of a business unit or for the employee or for HR? It can even reach into talent and recruitment.

Let's turn to rolling out the strategy. What have you observed about making the rollout effective?

I have seen real differences in how strategies can be rolled out.

In almost a contrarian view, there are some organizations where the strategy is articulated and then is never published. A learning strategy is the guiding principle for what is going to occur with knowledge and learning. And so to me, to not publish is an extreme. But, some organizations have said, 'this is our aspirational goal and we want to move people towards that,' and so it's done more covertly, if you will.

In general, learning strategies are published in some form and they then take on varied levels of external marketing. One example, and it's probably the other extreme, is that the strategy becomes an active part of talent. Somebody is hired and then exposed to some, if not all, of the learning strategy: 'Here is how we learn at this corporation.' In other cases, the new learning strategy actually leads to some rebranding; it might be the roll out of a corporate university name, or of a new portal name or of a new talent strategy.

Still, the marketing of the new strategy is ultimately not as important as the visible acting on it. It's as important as senior leaders making some decisions, announcing those decisions or rolling out new programs, then taking the time to refer back to how they tie into the strategic intent.

How long does it take to build a learning strategy?

I have seen strategies that have been put together in one evening on the back of an envelope on an airplane. Something may have happened and it was figured out that a new company was being bought, or boom, someone learns they are taking over a learning function; maybe there has been some other personnel change.

These situations are the extreme and probably farcical element of it. But there are learning strategies which have been put together in a relatively short period of time, a couple of weeks, pulling together the stakeholders. And once again, since a large percentage of what we are going to do is going to continue, it's not that hard to kind of build it from that.

On the other hand, some organizations may take a year or even a bit more to build the learning strategy. This usually occurs when the change is large, for example, the process of significantly aligning multiple standalone learning units around the organization. Instead there might be a compliance or risk management change, involving a sales department and a safety department, and in this case too, getting one enterprise learning strategy is going to take a while. Or, it may take longer because of aligning not only with other learning units but with a business unit; there may be the need to take it all the way up to where the CEO gets it, supports it and integrates it into his or her conversations.

Ultimately, it's really important that the building of the strategy does not prevent innovation. So if a learning organization has a long stretch strategy, they have to be very clear that it's not an excuse to delay making decisions, because learning happens every day and learning decisions happen every day.

What do you see as some of the biggest problems, challenges, and failures with learning strategies?

For one, the temptation that needs to be avoided is to go to "learningstrategies.com" and to try to buy one for a $1.50. It is actually very tempting to say, 'we are not so different from that organization, let's copy their learning strategy.' And the problem with doing that is not necessarily getting a bad learning strategy; it is that the process that leads to the strategy has been skipped. The strategy will probably not achieve the alignment, or the buy-in, or the learning that was expected.

Another is the temptation to wrap the learning strategy around a technology. We probably see this most often. I have seen organizations make a six, seven or even eight figure investment in a new enterprise LMS. Very often you get a learning strategy occurring, at least in part, as justification for that capital expenditure. The problem being that the strategy tends to be very narrow and self-serving. The strategy is better off not being linked to that kind of a spend.

There are also times where the learning strategy is just so vague that everything in the world would fit underneath that. It just has these warm fuzzies! For example, 'We will become all we are capable of being,' or 'We will honor the learning capabilities of every individual,' or 'We will attempt to give people what they need to do their jobs.' That's all fine on an inspirational poster.

But the problem here is that a strategy ought to serve as guidance when making decisions, meaning that an individual can refer to it and say, 'given our learning strategy I would go this way rather than that way. Both are good alternatives, but I will go this way because it is consistent with our strategy.' For example, given the strategy, the employee will go for that half-day program versus that five-day program. So, avoid the generalities!

Something else that is enormously important is not to target the learning strategy around temporal changes. Meaning even though a company is about to be purchased or there may be increasingly more people under the age of 25, those changes should not necessarily be included. Really, the strategy should be for the entire enterprise, not just for the thing that just changed.

And I'll add one more! There are folks who build action plans and call them strategies. So when it comes to the details of budget and a systems name and a specific model of instruction, that's not a strategy. That may be an action plan, but that's not a strategy. Long term, that plan might lead you to see the trees real closely, but you will not understand the forest.

What closing comments do you have to summarize, recap or emphasize?

There are so many things we can do in the world of learning; I don't think I have ever met a learning leader or a learning professional who says, 'well, I have nothing to do today.'

By definition, if you have a workforce, if you have a business or if you have an organization then learning is always going to present new opportunities. In fact, our biggest challenge is to choose and define the best opportunities. In other words, determining what the learner would choose, what the manager would choose to support and what the learning leader would choose to invest time and resources in.

It is critical that we understand where we are headed. It is critical that we understand all of the targets of opportunities so we pick the ones that are of strategic value. We must also have a basis of aligning with what our business clients and internal units want with what our workforce will expect as part of their contract for making their life's work at our organization. A well-articulated learning strategy enables us to do this.

And then finally, the importance of embracing innovation and to say that we continually need to be looking at our own processes to figure out: How can we do this better? How can we do this deeper? How can we have more impact? How can we do it with fewer resources? And how can we reach more of the workplace, more continually, to keep them more valuable, not only to the organization, but to themselves?

Ultimately, I don't know how you really lead an organization in learning without a current, rich, and affirmed learning strategy.

Elliott Masie

Elliott Masie is the Host of Learning2011 and the Chair of The Learning CONSORTIUM, a coalition of 240 Fortune 500 global organizations cooperating on the evolution of learning strategies, including Allstate, Google, Sears, Bank of America and Hewlett Packard. As an internationally recognized futurist, analyst, researcher and organizer on the critical topics of learning, technology, leadership and workplace productivity, he heads The MASIE Center, a Saratoga Springs, NY think tank focused on how organizations can support learning and knowledge within the workforce. He is the editor of Learning TRENDS by Elliott Masie, an Internet newsletter read by over 55,000 business executives worldwide, and is a regular columnist in professional publications.

Elliott Masie's
LEARNING CONSORTIUM

Member Benefits

The Learning CONSORTIUM is a vendor-neutral collaboration of over 240 global companies including American Express, Sears, McDonald's, Walmart and more. It is a non-stop source of learning resources, invitations to benchmarking, common work projects and access to Elliott Masie's research and development activity.

Here are just some of the resources that your organization can access:

Research & Development Lab Projects:

The Learning CONSORTIUM will be facilitating a wide range of Learning R&D activities (from no-tech to high-tech) in 2011. We will address these key areas:

- Leadership Development Models – New Approaches & Designs
- Video for Learning – Live & Asynchronous Uses
- Where to Collaborate – SharePoint, LMS & Beyond
- New Job Descriptions for Learning Professionals
- Blended Learning Mixtures – What Works?
- Refreshing the Classroom
- Tablets, Slates & Mobile Devices for Learning
- Workplace GPS: Performance Support 2.0
- Marketing & Branding Learning

Learning Roundtables:

We will host gatherings via webinar/conference call with fellow Learning CONSORTIUM members interested in sharing, benchmarking and collaborating about:

- LEAN/Six Sigma & Learning
- Sales Training Models & Innovations
- Tablets for Learning
- Neuroscience

Labs in a Box:

The MASIE Center ships a new piece of technology to or provides a member with a password to try new software. That member has two weeks to experiment with the technology or software. In the case of a physical piece of technology, the member then ships it to another member. Past examples include the iPad and Kinect. New Labs in a Box will be announced as we continue to investigate technology's/software's potential affordances for learning.

Events, Meetings & Classes:

Learning 2011:

Each member organization receives two complimentary seats to our annual fall Learning conference.

CONSORTIUM Membership Forums:

Regional CONSORTIUM-only meetings on key industry topics.

MASIE Center Events:

Discounts on the wide range of Elliott Masie's classes and briefings.

Learning Briefings:

Receive two personalized, 30-minute briefings by Elliott Masie or Bob Baker, our Chief Learning Officer. These are live telephone briefings for your team, focused on changing learning trends or key learning issues selected by your learning organization. Briefings are often scheduled as part of internal learning conferences or with senior executives. They can be digitally captured for later use by a wider audience within our organization.

Benchmarking for Learning:

Periodic surveys and scans on key industry topics that gather information to help you find organizations for member-to-member dialogues and industry trend analysis.

LifeLines & Mutual Support:

Information and resource sharing among members about your questions through our online discussion board tool.

Monthly Calls:

Telephone conference calls about key industry initiatives related to your business, technology and learning decisions.

Nuts 'n Bolts Calls:

Informal telephone conference calls held a few times per year that provide opportunities for members to present questions, needs/problems focused on the "nuts 'n Bolts" of learning to Elliott Masie, our staff and fellow members. Questions can be about any aspect of learning: methodology, strategy, tools, etc.

Content Focus:

- Learning Strategy & Management
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- Learning Systems
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Contact Us:

Brooke Thomas-Record
518-350-2227
brooke@masie.com

Cathy Masie
518-350-2230
cathy@masie.com

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