

# Journal of Executive Education

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Volume 12 | Issue 1

Article 6

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July 2013

## Recommended Practices for New Corporate Learning Leaders

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### Recommended Citation

Lamb, David (2013) "Recommended Practices for New Corporate Learning Leaders," *Journal of Executive Education*: Vol. 12 : Iss. 1 , Article 6.

Available at: <https://digitalcommons.kennesaw.edu/jee/vol12/iss1/6>

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## *Corporate Perspectives*

# **Recommended Practices for New Corporate Learning Leaders**

**David Lamb**

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### **Abstract**

For this article I have focused on leaders who are about to assume responsibility for the Learning/Talent Development function of medium to large companies. Although there are many additional areas that must be effectively addressed, the following are fundamental practices that I have found to be critical to success. When assuming the top role, it's difficult to balance the strategic and tactical demands of the job. My advice: err on the side of strategy development. Having a well thought out plan is necessary for success. *Good* plans focus on "what," "when," and "cost/benefits." It's important to document what will be done, the priorities assigned, the schedule for the start and end of new projects/programs, the budget required to accomplish the plan, and the value proposition for your plan. *Great* plans, in addition to the above, also focus on "how we think and act." Executive sponsor(s), clients, and staff members appreciate insight on how the learning leader expects people in their group to conduct themselves... and why. The most important undertaking for learning leaders is to establish and manage strong relationships with the senior executive team, and to engage them in developing a vision and planning process for learning/talent development. Learning leaders should also have a bias for analysis and planning. This will reduce execution time and will significantly increase the probability of success. During planning, align all that you will do with the corporate business strategy.

### **Introduction**

As in many professions, there is much diversity in the origin of corporate learning leaders. Although I am not aware of a formal analysis, my observations from 35 years in the corporate learning profession, and extensive interaction with senior corporate learning leaders, clearly shows this diversity of origins. In addition, to those who "grew up" in the Corporate Learning/OD/Talent Development functions, I know learning leaders from many other corporate functions, e.g., Operations, Human Resources, Information Technology, Sales and Finance. Others come from academia or large consulting firms.

Each brings strong capabilities to their learning leader role. Each has been successful in their careers. They can proudly point to accomplishments of business value. They take on their new role with energy and passion. Some are successful in meeting their companies' needs and

expectations. Some are not. There is typically some patience with the new leader, while they “learn the ropes,” but this dissipates quickly.

Is there a tool that can support a good start? Indeed there is. A carefully constructed and well executed checklist will significantly increase the probability of success for new learning leaders. More will be discussed on this topic later.

This is not a formal treatise; it is not based on statistically significant data; and it is not drawn from formal research or “white papers.” It is simply based on many years of “try it, fix it, try again.” It reflects my experience in benchmarking; involvement in CLO think-tanks; membership on various Learning Advisory Boards for professional societies and universities; and much appreciated input, support, and professionalism from the learning teams that I have led. In particular, the Rollins, Inc. corporate university that has placed in the Training Top 125 for ten consecutive years and received numerous awards: the ASTD BEST award, awards for Learning Innovation, and the 2011 CLO Magazine LearningElite award for Best Small Enterprise Learning program (a peer-judged benchmarking initiative to identify best learning practices).

The following is not offered as “The Answer.” There is no one best way to do most things in life, and certainly no single best way to lead a learning function to exceptional performance. However, I have found these steps to be helpful for producing solid performance when assuming responsibility for building or enhancing a corporate learning function.

For this article I have focused on leaders who are about to assume responsibility for the Learning/Talent Development function of medium to large companies. Although there are many additional areas that must be effectively addressed, the following are fundamental practices that I have found to be critical to success.

## **Recommended Tasks**

When assuming the top role, it’s difficult to balance the strategic and tactical demands of the job. My advice: err on the side of strategy development. Having a well thought out plan is necessary for success. “Fail to plan, plan to fail.” The list below is designed to help new learning leaders balance both strategic and tactical demands. It can be used as a starting point for developing a customized checklist. Recommended tasks (for completion in 3-4 months) are:

- Conduct a thorough business analysis (both company and industry).
- Establish and manage important relationships that build your credibility and trust factor, e.g., relationships with leaders (formal/informal); learning staff; other corporate staff and internal customers.
- Implement an effective Instructional Design Methodology that includes performance consulting methods and tools (for example, the Performance DNA methodology that focuses on accomplishments of business value).
- Assess the current state of the company’s knowledge and skills.
- Define the appropriate Enterprise Learning System infrastructure and platform:
  - Include LMS; LCMS; ITM; multiple delivery modes; analytics; etc.
  - Have a bias for Learning/Performer Support delivered to multiple devices.
    - Focus on blended solutions (e- including Social Learning tools and methods).
    - Distribute a Request for Information to 5 to 10 service providers.
- Establish a Corporate Learning Steering Committee.
- Define the desired future state for knowledge and skills (with learning goals).

- Ensure alignment of the learning goals with corporate goals.
- Develop and communicate a learning plan for one year *and* for three years.
- Create a Marketing program for the learning plan (and each major initiative).
- Design and build your team.
- Develop a team gap analysis and an ambitious plan for closing the gaps.
- Select, train, and implement learning tools and methods (for formal and informal learning).
- Develop an execution plan (deliverables; people; process; technology; and marketing/communications).
- Present learning plan to clients, the Learning Steering Committee and the Executive Steering Committee.
- Develop and publish an approved Learning Plan.
- Form teams and initiate projects based on the Learning Plan.
- Quickly complete the first high visibility, high value initiative (small in scale if possible).
- Calculate the total costs and benefits of major learning initiatives.

### **“How We Think and Act”**

*Good* plans focus on “what,” “when,” and “cost/benefits.” It’s important to document what will be done, the priorities assigned, the schedule for the start and end of new projects/programs, the budget required to accomplish the plan, and the value proposition for your plan. *Great* plans, in addition to the above, also focus on “how we think and act.” Executive sponsor(s), clients, and staff members appreciate insight on how the learning leader expects people in their group to conduct themselves... and why. The following are my recommended additions to a Learning Plan document. Think of these as appendices that express expectations for the methods to be used and the professional demeanor to be exemplified:

- Vision – What we aspire to be.
- Mission – The reason we exist.
- Critical Success Factors – The things that must go well to accomplish our mission.
- Basic Tenets – Principles held true by our associates.
- Best Practices – Methods that will lead to success in meeting client expectations.

### **The Learning Leader Mindset**

The most important undertaking for learning leaders is to establish and manage strong relationships with the senior executive team, and to engage them in developing a vision and planning process for learning/talent development. Learning leaders should also have a bias for analysis and planning. This will reduce execution time and will significantly increase the probability of success. During planning, align all that you will do with the corporate business strategy.

Lead the learning function as if it is an external learning services company. Think, act and talk as a business professional, not as a learning professional. Doing so will increase your credibility and will allow your “customers” to think of you as a partner and trusted advisor for their learning and talent development challenges. Keep the Learning Plan flexible. Treat it as a living document that can and will change based on changing client needs and priorities. Keep the learning vision, mission, and critical success factors firmly in mind and “Begin with the end in mind.”

## **Conclusion**

There are many pressures on new learning leaders to perform quickly. However, there is no generally available list of best practices that can support a successful beginning. The above is intended only as a starting guide. The development of a more robust set of best practices would be beneficial to the learning profession, as well as to our learners and companies.