

# 9 'Best' Best Practices of High Functioning Learning Organizations

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**LIVE LEARNING THINK TANK DISCUSSION**  
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## INTRODUCTION

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*The purpose of our LIVE event was to build upon the year's previous Think Tanks—to exchange the “best” best practices being used to thrive in an increasingly competitive global marketplace.*

Over the past year, the Learning Executive Think Tank, sponsored by Expertus, has held four very meaningful conference call discussions among top minds in learning management about key issues affecting the training industry. Each of these discussions have generated a series of white papers that have helped other training leaders learn how to improve efficiency, survive an economic recession, better communicate the value of training programs, and get closer to customers.

In September of this year, we had the unique opportunity to hold our first annual LIVE Learning Executive Think Tank in Scottsdale, AZ. This half-day event was attended by 17 of the learning industry's top minds, and represented a good cross section of the business community including: software development, financial services, personal and business computing, workforce management, health care services, and others.

Hosted by Tom Clancy, the VP of Education at EMC, and Ernie Kahane, the Director of Training Strategy at EMC, the purpose of our LIVE event was to build upon the year's Think Tanks—to exchange the “best” best practices being used to thrive in an increasingly competitive global marketplace. Participants were asked:

***What are the most significant challenges or opportunities facing your business in 2010?***

Prior to the meeting, each of our Think Tank participants were asked to present their top five best practices according to the Strategic Relevance Framework on the following page:

**STRATEGIC RELEVANCE FRAMEWORK**



**A STRONG FOUNDATION CREATES VALUE**

*Prior to the meeting, each of our Think Tank participants were asked to present their top five best practices according to the Strategic Relevance Framework.*

**ALIGNMENT**

- Relationships are the bottom line
- Account mapping

**OFFERING**

- Readiness focused
- Role-based
- Blended and scalable

**EXECUTION**

- Over achieve
- Vendor to consultant plan
- In-depth technical knowledge

**INSPECTION**

- Operational command
- Inspect what you expect
- Programs tied to business metrics

**UNIQUENESS**

- Compelling value
- “Nice to have” or “Must have”

*This white paper provides an inside look at 20 learning leaders "best" best practices with respect to the issue or opportunity it addresses, what the practice is, and how it has benefited their organization.*

Using this framework, learning executives were then asked to choose those practices or activities that: differentiate what they do, are compelling, and are the "best" of the best practices currently being utilized or planned for implementation.

This white paper provides a summation of the "best" best practices with respect to the most pressing issue or opportunity that each executive has or is currently facing. Also provided, are the key findings these 17 learning leaders generated, to address their current training challenges.

With a few exceptions, the learning executives at our LIVE Think Tank shared many of the same challenges and concerns. Each offered a number of effective methods for successfully overcoming major issues while helping their organization achieve its objectives.

## THE 'BEST' OF THE BEST

*Stakeholder communication meetings can result in a more effective utilization of development resources and training time.*

All of our learning leaders brought with them a single best practice that they deemed had the greatest impact on their effectiveness. Here are some of the “best” best practices that were shared:

### 1. Advisory Councils

A common challenge in the design and implementation of training curriculum is making certain that training: effectively addresses need, will be implemented as intended, and will align appropriately to business objectives. One learning leader found advisory councils to be the most effective means of ensuring effective content design and implementation. By creating a solid cross-section of decision-making executives and front-line managers, training is sure to be more successful.

*“Advisory councils help our organization eliminate the disconnect between those at the corporate level and those working in the trenches.”*

### 2. Stakeholder Communications

For one executive, one of the biggest challenges is communicating the importance and relevance of training development projects. This participant’s ‘best’ best practice is to conduct bi-weekly stakeholder meetings with various leaders and representatives who are involved in or directly affected by training initiatives. These meetings provide an opportunity for each participant to review and approve the training plan that has been developed.

*“Stakeholder communication meetings have resulted in a more effective utilization of development resources and training time, have provided an opportunity for consensus on business priorities, and given development managers more accountability in training initiatives.”*

### 3. Quarterly Development Process

People working in large organizations are often inundated with a lot of information such as: announcements, job-related directives, products, competitor information, and personal communications. All of this information can be difficult to harness and absorb. A Quarterly Development Process (QDP), driven by a learning council, is how one learning executive cuts through the information clutter. The object of the QDP is to ensure that the organization remains innovative by creating a total-readiness culture. Benefits of this company’s QDP have included global readiness across all functions, streamlined corporate development, decreased operational costs, increased revenue, and an enhanced learning environment with thousands of managers trained and functioning as coaches.

*A global approach to training produces a true worldwide buy-in of learning programs, can reduce the cost of training significantly, and provide a longer shelf-life to courseware.*

*“Our managers act more like coaches. The value of our group has increased because we’re seen as valuable consultants. We provide important metrics that provide real meaning to the overall success of the company.”*

#### 4. Global Process

Designing and implementing training that can function on a global scale can be quite challenging. One of our learning leaders ‘best’ best practice addresses this challenge by using a Global Process. This Think Tank participant develops programs that are scalable, flexible, and address cultural issues while remaining true to corporate objectives. This initiative has resulted in a true worldwide buy-in of training programs among its participants, has reduced training costs significantly, improved the overall quality of training, and provided a longer shelf-life of courseware.

*“I am truly developing world-class content that can be applied globally. Everything I’m teaching can be built upon itself. We have processes in place to make sure it’s not duplicative.”*

#### 5. Go Slow to Go Fast

In order for training to be deemed ‘effective’ it must be measured and evaluated. This measurement should demonstrate the impact on investment in terms of time, money, and productivity. To ensure positive results, one of our Think Tank panelists ‘goes slow to go fast’—engaging in painstaking pre-work to make certain that every program detail is clearly aligned to address a specific issue or challenge. This pre-work might involve challenging his own ideas to make sure that goals are viable, leveraging technology to ensure skill development sticks, and building prototypes of all the tools needed in the training initiative and testing them out. The result has been complete alignment from the top down and significant business growth by building the talent within the organization.

*“We have a robust portal that links the manager to the learner. This provides wonderful alignment from the top down. We’re growing the business by building talent. This is the mantra behind our learning programs. We’re even getting anecdotal evidence that our programs are working from our customers.”*

*On-boarding programs are a great training technique to successfully integrate new hires at all levels of the organization, into one corporate culture.*

## 6. External Executive On-Boarding

A challenge of large or culturally-diverse organizations is the successful integration of new hires into one corporate culture. Some of our learning leaders have addressed this dilemma by establishing on-boarding programs designed to accelerate integration and productivity of new executives. Details of one 8-month executive on-boarding program include:

- “Fast-Start” executive on-boarding coaches for the first six months on the job to serve as a resource and go-to person for any questions, concerns, or needs.
- Business targets are established in the first 30 days to establish immediate goals and help executives become fully immersed in the organization immediately.
- A functional silo tour is conducted to better help executives understand the business model and inter-dependencies of the organization.
- An executive mentor is assigned for the duration of the on-boarding program to aid in assimilation.
- Hogan leadership style assessment is conducted to help understand the executive’s individual needs and style to help facilitate learning.
- Executive team, new hires, and their spouse(s) attend a welcome dinner at the president’s home.
- A total evaluation to assess where the executive is currently at and develop a 12-month action plan for settling in.

*“The overall response to this program has been extremely positive. Target group reports demonstrate that those who participated were more satisfied in their career choice, more confident of what is expected of them, feel they fit well within the team and culture of the company. As a result of executive on-boarding, the company has not experienced any instances of new executives ‘timing out’.”*

Another Think Tank participant who utilizes a comprehensive on-boarding program noted that new hire turnover decreased from 14% to 2% and productivity improved 4-40% (depending upon the business segment) as a direct result of their on-boarding efforts.

## 7. Mentoring Programs

With the prevalence of self-paced training and virtual learning environments, companies are now struggling with how to infuse more of a human element into their training initiatives. To make learning more “high touch,” one of our participants utilizes a highly successful and well-established mentoring program. Training is delivered online, however mentors are used to help new hires grow in their core knowledge for job success and improved leadership.

*With the prevalence of self-paced training and virtual learning environments, companies are now struggling with how to make training programs more 'high touch.'*

*"We were required to deliver learning through a customer management system (CMS) and deploy this training organization-wide in just three weeks. We looked to a blended learning approach for our mentoring program. It was well received by top management because it addressed three mandatory knowledge areas: core (necessary), excel (leadership) and grow (creation of new leaders), while keeping training high-touch."*

### 8. Virtual Learning Environments

Economic conditions and the increase of work-at-home employees has altered one learning executive's training strategy to incorporate virtual learning environments. Virtual Learning Environments (VLE) allow new hires to interact via the web with a training facilitator (or coach) just as they would if they were in a real classroom. The VLE is a full-service training environment that allows students to set up coaching appointments, interact with other team members, and easily access learning assignments based on their individual needs. The VLE has enabled new hires who work from home to better acclimate to the corporate culture and receive the support they need to be effective in their position.

*"We had to eliminate two layers in the organization, so now we have training managers who have about 20 trainers reporting to them from all different locations. The VLE allows the managers to create a team environment without any extra costs to the business. All scheduling is accomplished online. Coaching conversations and question/answer sessions are conducted via telephone. The VLE now replaces live training."*

### 9. Blended On-Line Learning

Many learning executives struggle with delivering content on demand; in a timely manner; in a way that is measurable, efficient, and cost effective. One Think Tank panelist's "best" best practice is to create a blended, online learning approach that includes job aids, reference guides, live webinars, on-demand content, guided practice, and e-learning courses. This blended learning approach has eliminated the need for classroom training; has proven to be very cost effective; and is scalable, measurable, timely, and consistent.

*"Our efficiency has increased, delivery of learning has been cut in half and we have won over our executives with small wins. We just started publishing courseware online with great success."*

## OTHER KEY FINDINGS

*The goal of a training council is to avoid developing training in an 'ivory tower.' It ensures there is no disconnect between corporate executives and those working in the trenches.*

**Alignment**

***To gain and maintain credibility, training must be tied directly to the bottom line.***

All divisions of an organization (especially those at the executive level) must be able to see both quantitative and qualitative proof that a specific training program has directly benefited the bottom line. Finding ways to engage managers and executives in the planning and implementation of training does this most effectively. One Think Tank participant, who represents one of the nation's fastest growing software companies, accomplishes this through *training councils*.

*"The goal of these councils is to avoid developing training in an 'ivory tower.' It ensures there is no disconnect between corporate executives and those working in the trenches."*

Much of our panel agreed that training or advisory councils are important, and some shared how their implementation and execution varied. One of our participants noted that one of the critical success factors to advisory councils is composition. Most importantly, the council must be an agent for addressing the pressing issues, and a vehicle to execute a plan to address those issues. To accomplish this, the council must include the following:

- People who are in a position to make decisions on the toughest problems
- Representatives from all impacted departments
- Managers and individuals who are responsible for executing change

Ultimately, the purpose of a training advisory council is to isolate issues, determine a course of action, and implement change as efficiently as possible. It is also an effective means to identify, prioritize, and provide status updates on all ongoing training development projects.

What an advisory panel is *not*—is a committee wherein issues are discussed then tabled or passed along for further review. Success demands immediate action and this is what an effective training council should provide.

An additional benefit to training councils is the increased credibility they provide to executive management. Being in direct contact with corporate executives and demonstrating first hand, the connection between training effectiveness and business results, helps legitimize training within organizations and stabilize or increase budgets for future initiatives.

*Needs vary greatly within every organization. As such, the challenge noted by many, is finding effective training methods that offer the right learning, at the right time, to the right people.*

Some additional ideas our participants shared regarding alignment include:

- **Leaders as teachers**—Executives from the CEO down, should be engaged directly in the training process, transferring their knowledge help groom future leaders within the organization and help make a more cohesive organization.
- **Leadership development**—Training should include leadership development that is directly aligned with senior executives' vision for leadership and that is championed through the training delivery and content.
- **Coaching**—Ongoing coaching and dialogue with the executive team members regarding the quality of leadership, business strategy, and employee engagement is key to instill alignment.
- **Skills development**—Business need should drive the skills that are delivered on-demand.

Participants agreed that in order to have correct alignment you need to understand your product or service completely, clearly define the needs to be addressed, measure outcomes, make adjustments to training necessary, include a cross-section of your company to test the process, and verify results to ensure credibility.

### Offering

***Because no two organizations are the same, training must be flexible, role-based, and scalable.***

No two businesses, individuals, or even divisions within an organization are the same. Needs vary greatly within every organization. The challenge, as noted by many of our learning leader participants, is finding effective training methods that offer the *right learning*, at the *right time*, to the *right people*.

There were several different ideas presented with regard to training offerings—each stressing the importance of finding the correct balance between *cost*, *effectiveness*, and *flexibility*. One of our learning leaders addresses these demands by focusing on the vital few.

*“By focusing on the vital few and not the insignificant many, we have experienced a more effective utilization of resources, training time, and agreement on business priorities.”*

The overwhelming variety of demands that can occur in organizations can sometimes stifle effectiveness. Consequently, one of our Think Tank panelists implemented a plan to map training metrics to call center metrics in order to create efficiencies.

*In order to over achieve objectives, training must be developed and implemented in a timely manner to support company initiatives.*

*"We are able to identify the top 10 to 20 issues regularly being dealt with in our call center, and then tailor training to address those issues. This has greatly reduced call resolution time and increased customer satisfaction."*

This learning leader has further enhanced training using on-demand, hands-on labs for new product installations which enables workers to engage in 15-minute training videos during inactive work periods between calls.

Some additional ideas our Think Tank participants shared regarding Offerings include:

**On-Demand Learning Labs (ODL)**—On-demand learning or self-directed learning combines live labs with self-paced learning. The goal of this blended approach is to address the individualized needs of each learner. One of our participants developed an outsourced ODL in response to customer demand, which in turn has offered him a great deal of flexibility.

**Virtual Delivery Models (VDM)**—Delivering engaging training events via a virtual delivery method can be cost effective and expand the reach of existing training programs. One of our participants utilizes a 100% VDM for their "train the trainer" program to reduce travel costs.

*"Our train the trainers program is conducted via Live Meeting. Our participants are required to develop two simulated training events which we then have them deliver via VDM to their assigned coach. This ensures they have an individualized plan for best practices."*

**Role-Specific Learning**—Role-specified learning ensures that training addresses the specific needs of the individual.

**60/40 Training Model**—One of our participants suggests a blended curriculum that includes 60% facilitated training and 40% web-based training. This training model helps to solidify the relationship between management and employees (facilitated learning), while providing the necessary skill-based training (web-based training) needed to execute the job.

Finding the right mix of training modalities is a common concern for all learning leaders. The cost effectiveness and accessibility of self-paced or virtual training sometimes comes at the expense of important human interaction. The important point here is that needs should be accurately determined before a training plan is made. One participant shared his three-tiered approach:

*E-Learning --> Blended Learning --> ILT or Role-Based Learning*

The goal is to map e-learning to delivery level and give business leaders a common language to talk about the complexity of learning.

*Uniqueness should be an objective in all training initiatives. Assessing training uniqueness helps separate out the “nice to have” programs from the “must haves.”*

### Execution

***The goal in execution is to over achieve your established objectives.***

In order to over achieve objectives, training must be developed and implemented in a timely manner to support company initiatives. It requires that a system be established for the management of talent, performance, retention, succession, and recruitment.

Our participants agreed that success in execution demands:

- Multiple training delivery strategies be available and scalable to address disparate audiences and needs.
- Establishing mechanisms that enable you to accurately forecast training needs that lead to a predictable and scalable learning organization.
- Being flexible and ready to deploy various training across the organization rapidly.

### Inspection

***It is essential that training be tied directly to business metrics.***

Inspection requires that you ‘inspect what you expect’ or verify that results are meeting expectations. Here are some of the ways our learning executive panel are successfully accomplishing inspection:

- **Positioning learning as a pathway to revenue**—Work backwards to determine how learning initiatives contribute to the bottom line and validate this through the proper metrics.
- **Be accountable**—Hold yourself accountable to properly implement, assess, and report.
- **Action learning**—Try out learning in a simulated environment, record findings, and perfect training models before they’re rolled out.
- **Map training**—Map training to proper business metrics to support ROI on training.
- **Dashboards**—Establish weekly dashboards to get real-time readings of program success and provide mechanisms for accountability.
- **Capitalize on technology**—Utilize online tools to assess knowledge, understanding, and application.
- **Business-savvy trainers**—Utilize trainers who are also business-experts to ensure training is tied to corporate objectives.

*Include a communication plan with every training course to get company-wide buy in and effectively market your training program.*

- **On-boarding**—Implement on-boarding to get new-hires at all levels up to speed sooner and increase retention rates. On-boarding also decreases attrition and increases productivity.
- **Attach rates**—Consider bundling training with product sales (if applicable) to provide a cross-functional alignment that is very powerful.

### Uniqueness

***Training that provides compelling value to your organization will be viewed as essential to business success.***

Uniqueness should be an objective in all training initiatives. Assessing training uniqueness helps separate out the “nice to have” programs from the “must haves.”

Our Think Tank panel presented their most unique training practices:

**Leadership framework**—This group-wide leadership framework involves skill-based and behavior-based expectations for all leaders in the company.

**Global self-serve management reporting tied back to business initiatives**—One of our panelists uses self-reporting as a means to measure the knowledge of new products. Self-management reporting has shown that 93% of their employees are trained within 8 weeks on new products. Self-reporting has been adopted at the highest level because it has been proven to be tied to revenue.

**Communication planning**— A communication plan should be included with every training course that covers sponsorship buy-in and a marketing plan. Use the corporate intranet to effectively disseminate information and create buy-in company-wide.

**Virtual Delivery**—Live Meeting, Webinars and other virtual tools can be used to facilitate ILT and speed up training. Some of our panelists utilize these online tools at all levels of training and have shared impressive results.

**Virtual Learning Environments (VLE)**—This is a simple way to interact with students using online means. With more people working from home, creating a flexible learning environment is critical. One of our participants was able to use VLE to create a virtual coaching environment. To train managers this learning executive uses real-time, web-based tools to conduct training session, meetings, and publish reports. The benefit of VLE is, at-home employees feel like they are more a part of the company team. Training is all self-paced as well, which cuts training costs.

## CONCLUSION

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Our first LIVE Think Tank generated a number of powerful ideas and strategies to help today's learning leader overcome real challenges. Implementing just one "best" best practice might be all you need to make a real difference in your learning organization and impact future profitability.

It is important that the dialogue among learning executives continue to share ideas, track trends, and test the viability of best practices over time. The Learning Executive Think Tank is just one small way we can continue to improve the learning organization so that it remains a viable part of the enterprise.

## ABOUT THE LEARNING EXECUTIVE THINK TANK

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The Learning Executive Think Tank, sponsored by Expertus, was created to bring key thinkers together to generate insights and best practices in order to help learning leaders run more effective organizations. For the future viability of the training industry, it's important to look at key issues affecting learning organizations so that we may give back to the training industry and learn from each other.

Learning Executive Think Tanks are by invitation only and are held five times a year—four via conference call and one face-to-face roundtable discussion. Think Tank participants are proven, senior-level learning executives who have long track records of successful leadership. In our discussions, we concentrate on real results and the business aspects of training.

## ROUNDTABLE HOSTS

**Tom Clancy**

Tom Clancy is Vice President of Education Services at EMC Corporation. At EMC, Tom has held various field and corporate roles, primarily in Sales Productivity and Partner Management, focusing on field development, best practices and change execution. Since 2002, his primary responsibility has been leadership of the education role for all internal and external audiences.

**Ernie Kahane**

Ernie Kahane is Director, Learning Strategy and Acquisitions at EMC Corporation. Ernie has over 25 years experience in the learning and development field. Ernie has been a medical educator and has held leading training and management consulting roles at Honeywell, Digital Equipment Corporation, and Compaq. He holds a Ph.D. in Educational Policy Studies and Instructional Design and is co-inventor of two patented consumer products.

**Tom Kelly**

Tom Kelly has more than 25 years of experience in the education and training industry and has held positions at NetApp, Cisco, Oracle Corporation, Sun Microsystems, NeXT Corporation and Control Data Corporation. Tom is currently a trusted advisor for a growing list of clients, including small to mid-sized companies focusing on learning organizations systems and strategies.