

Edited by
TAMAR ELKELES

FORWARD- FOCUSED LEARNING

INSIDE AWARD-WINNING ORGANIZATIONS



Foreword by **KIMO KIPPEN**

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Becoming a Strategic Business Driver

Brad Samargya

Business integration is a key priority for all learning organizations. Linking learning strategy to business strategy ensures business impact and longevity of a learning function.

Why is it that when times get tough, learning is one of the first areas to get cut?

Anyone who has spent any length of time in employee learning and development can share tales of valued colleagues no longer here, program budgets cut to a fraction of what they used to be, and travel budgets that have shrunk to the point employees may not even get to meet their managers once a year.

Sound familiar?

This has been my personal observation as a learning leader, and at times my personal experience. Along with many of you, I have ridden the roller coaster of expansion and contraction that inevitably happens to our learning organizations in concert with the business. And many of you have shared your war stories with me.

When the budget axe falls, those of us who survive all wonder what the heck just happened.

Our first reaction is often that the fault lies elsewhere. We are underappreciated victims of a finance-driven spreadsheet exercise. Others are making critical decisions, we are not invited to the party, and we cross our fingers hoping someone will stick up for L&D.

Why are the other departments, especially sales, products, and services, getting all the money while we reduce our investment in our most important asset, our people? It can get a bit tiring, but we can commiserate and take solace from our friends in marketing, HR, and other support organizations who also bear the brunt of the latest round of budget cuts.

Learning leaders need to step up and take responsibility for making learning and development a strategic priority that is protected and valued. During my 20 years of experience as a chief learning officer I have learned this lesson the hard way, and I've developed some best practices I think can help. I break them down to four key actions you can take to achieve a seat at the table as a strategic business driver, essential to the success of your organization.

Step One: Build Staff Capability in Aligning to the Business

I have seen first-hand how senior leaders are overwhelmed with the day-to-day challenges of making their sales quotas, developing their products, and delivering their services, while running from meeting to meeting and customer to customer. I find I want to shout slow down, take a short time out, and let's talk about your employees. It is indeed sometimes difficult to elbow your way into their calendars to talk about employee development and build the relationships you need to be a strategic business advisor—but we must!

And what should you do once you get in front of a business leader? You need to engage with them on their terms. You need to gain credibility starting with establishing that you understand their business priorities and can help support them in achieving their business goals. This starts by engaging in conversations about the business drivers and identifying key dependencies on people and their capabilities to execute the business strategy. To resonate with leaders, you need to talk about strategic competence gaps and needs, not training. This is followed by discussions regarding whether the organization has the talent it needs to be successful, and if not, whether it needs to build or buy those skills.

As a learning organization, aligning your learning team to the business is how you must gain the table stakes to be relevant. It is imperative you align very capable learning partners to each major function, its senior leader, and their leadership team—not an easy feat. This is a tough role to fill, requiring a very talented learning professional with business acumen. Your leader cannot be an order-taker, and they must have credibility! Ideally they are someone with domain experience; they absolutely must be a performance consultant regarding the dimensions of competence and people. They hear their stakeholder's pain but question the true root cause, do not jump immediately to the training solution suggested by the leader, and return with an analysis of the underlying cause or performance issue and a proposed solution that will have real business impact. By the way, if and when cost cuts are coming, not having these relationships and alignment virtually assures a bad outcome for you and your team. That said, organizational alignment should follow the steps presented here to yield any results.

A note here on performance consulting: This is an invaluable skill that I believe every learning professional should have, whether they are business-leader facing or internally facing. If you are not familiar, learn more about the capabilities required as well as some of the great training available to build these skills. The way I find to equate this to learning is a doctor–patient analogy. Simply put, we are not order takers.

If a patient approaches a doctor and tells them they need a major operation, the physician does not order surgery for the next day. She explores with that patient why they think they need the operation, she inquires about the symptoms, she runs tests to gather additional information, she reframes the problem and offers the correct solution, and then she schedules a follow-up to see if the treatment resulted in a positive outcome.

This is no different from the business leader who tells the learning partner, “We are missing our sales number, so we need to train 5,000 people on storytelling skills. Can you start the training next month?” A learning performance consultant will:

- » Understand the pain.
- » Gain agreement on a next step to engage with stakeholders to better understand the challenge.
- » Gain insight into the actual root cause of the business problem (which often is not the one initially identified by the executive).
- » Reframe the challenge with the business leader.
- » Agree on the proper learning solution as well as how to measure success once executed.

Step Two: Create a Strategic Learning Business Plan

I have been shocked at how many companies have a robust and very resource-intensive annual strategic planning and budget process that lacks a critical component: competence planning. Regarding L&D’s role, I call this process “strategy to competence,” and I believe it is an essential part of your overall strategic business planning process for each major unit you support. This is best done in partnership with workforce planning and your HR business partner, although I have found it is best for L&D to take the lead in this focused discussion.

Once L&D is organizationally aligned, you must get involved in the strategic planning process, ideally in the form of a formal process working with stakeholders to address some key questions that ultimately result in a strategic learning business plan for that unit. You will know when you have succeeded because it will be owned by the business and formulated with your L&D performance consultant team working with management and backed by resources and budget. The questions are simple; the plans, the formation, and execution are not. Ask:

- » What are the major strategic competence gaps that could that prevent us from executing our strategy?

- » More specifically, where do these strategic competence gaps exist in terms of job roles, units, and geographies, and what is our plan to ensure we have competent resources in place to sell, develop, or deliver programs to execute against our strategic and operating plans?
- » Will we need to build or buy (hire or acquire) this competence to address these gaps?

Don't be surprised if the leadership team you are supporting has not fully thought this through; when they haven't, you will see their business plans fail. After the fact the business will realize that the sales team did not have the competence to effectively position and sell your products, the services organization did not have the competence to deliver the services you sold, or the product organization missed deadlines or produced products with quality issues that affect your customers.

When you pose these questions during the planning process, you may find that your senior leaders do not actually know all the answers, but their people do. This is where L&D's performance consulting skills are really needed. Make sure your team conducts a workplace analysis with mid-level management and especially employee focus groups to identify or validate perceived competence gaps and possible solutions and take these findings back to senior leadership. They will very much appreciate that the plans are grounded in research and discovery within their teams.

Personally, I take great pleasure in working with the business in partnership to craft these plans and my L&D team does as well. It is rewarding and very interesting.

So, a lot of hard work is done to craft a solid strategic learning plan. But a plan is not enough; you must get senior leadership of that unit and their leadership team to understand and sign off on that plan. The way I have done this is gain agreement with the business leader to speak at their next leadership team meeting. With their sponsorship, you can present the strategic learning plan supporting the business strategy with clearly identified strategic competence gaps, and then share the learning plans to address those gaps.

With leadership, it's important that you make it clear that the strategic learning plans resulting from this process are the business's plans, not L&D's. Yes, you will step up and execute, but you need the input of subject matter experts to develop the solutions and the support of management to drive adoption along with the funding needed to make it happen. This ensures an interlock with leadership and ownership by them and creates a clear interdependency on learning for the success of their strategy and achievement of their operating plans.

When this is done well, you may find your budget and resources for next year substantially increase because you are interlocked with the business and have strong executive supporters who include competence development as a key part of their strategy and plans for the coming year.

Step Three: Use the Plans to Back Up Your Budget

Is this strategic planning process I recommend a guarantee your budget will be approved? No. But in good times as well as tough times the business leadership will be the first to support L&D's plans with finance when you are aligned to their strategy and have done this well. I have had the CFO on several occasions push me to cut my budget substantially and had the business leaders and even the CEO back me up and support our plans.

Let me share more here about an approach that has worked quite well for me in the past when given a very difficult budget target to achieve during challenging times. We all need to make tough calls when asked to reduce budgets, and L&D will likely have to do its part. I recall in a prior role in a very difficult year, all leaders had to significantly reduce spending. The preliminary target I was given was far too drastic a reduction and I knew it would hurt the business and its future. The CFO and finance team were not in the mood to debate, and I had a number to meet.

Rather than cut to the CFO's number, I put together a summary spreadsheet with total L&D expense from the prior year followed by rows of cuts that I would need to make to achieve the new target from finance. These reductions I divided into three sections using the colors of a stoplight:

- » green, which were program cuts that were tough but I proposed we should make given our financial challenges
- » yellow, which were flagged as a "caution," which would materially affect the business and management needed to have a full awareness of that impact before making the cuts
- » red, which I called "cutting to the bone marrow," that I recommended we do not do as they would severely hurt the company but would be cut if we were held to the target.

I called the CEO and asked to meet face to face. I told him I could achieve my new target but was very concerned and wanted to discuss the impact of each reduction and get his buy-in to the plan. I told him I could not make these decisions on my own knowing the potential effects to the business. In the end, we agreed on the green cuts, which I made. Surprisingly, he said we should not make many of the yellow cuts, but most importantly he agreed we could not make any of the red cuts as they would cripple our business. He actually cut less than I had planned. Later it only took a two-minute conversation with the CFO to agree on my final target, because he understood the decisions were based on business impact. I could not have had this discussion without first having solid plans in place. The key was involving leadership in the tough decisions and making them aware of the potential impact to their business.

Now on to recommendation number four.

Step Four: Maintain Continuous Engagement With the Business

To maintain the partnership with the business and engagement with senior management, it is critical you deliver the learning plans you have jointly developed and, just as importantly, stay actively engaged with senior leadership on an ongoing basis. You need them to understand the status of the strategic learning initiatives, assist in mitigating any barriers or risks, and engage them in change communications and driving adoption. In return, they expect to hear back from L&D about the results and business impact. This regular interaction year to year will ensure that leadership continues to value the L&D function as a key business partner and competence development as a critical component of their operating plans.

To continue this productive relationship, I recommend quarterly, or at the very least semi-annual, meetings with the senior executive leader and more regular updates with their leadership team or your key business sponsor. There are obviously many reasons for this, including continued visibility and support. Most importantly, the L&D team can reinforce the message that these plans are strategic, they are owned by the business unit, and the leadership needs to ensure continued involvement. This is your ticket to regular interaction to keep employee development on the agenda. When done well, visibility for L&D significantly increases with your senior leaders.

One technique my team has successfully employed was to complement the periodic status review and planning sessions leading into each fiscal year with a semi-annual feedback loop. Why? In the past I found out too late when stakeholders were not happy or did not value what we did; it usually came as a surprise, and often during tough budget discussions when leaders did not support the L&D team assigned to them. Of course, if someone is not happy, you want to find out immediately and course correct.

We designed a process where we asked our business stakeholders to provide feedback on our performance and inserted this into the goals of the L&D strategic business lead as well as our entire L&D leadership team. We asked the overall leader and those members of their leadership team we were closely supporting to measure us on a scale of one to five on the following criteria, which we tracked over time:

- » Do we understand your business?
- » Do we provide proactive business advice with regard to competence development?
- » Do we craft strategic learning plans that meet your needs?
- » Do we develop quality learning solutions?
- » Do we measure and report back results?

We found that this feedback mechanism was invaluable. No surprise, not everyone is pleased with L&D. In fact, I have employed this technique several times, and

each time our scores were initially disappointing but showed continuous improvement to the point we soon averaged excellent scores.

By asking this range of questions it means that we are measuring more than just learning completions. It means we are identifying whether L&D is in tune with the business and able to make an impact. It provides the opportunity for L&D to show progression as well and increasing alignment with the business.

Within my team, we agreed to use the process as a positive measure and not punitive, because when it was first introduced my team was nervous. No one was penalized for a poor score (and yes, we had some). Interestingly, we also had some strong supporters who suddenly dropped their scores over time. What we did value and execute very well was that we would listen to the why of the poor rating and agree on an action plan with that leader. In most instances this led to them becoming our best supporters. I recall one leader saying in their entire career they had never had a support function ask the business to rate them and wished all other support organizations would be brave enough to do the same. And last but not least, this gave us another tangible measure of our stakeholder satisfaction scores and value to the business to report to our own leadership.

Litmus Test on L&D Alignment

In summary, a quick way to measure how well aligned you are to the business would be how well your senior business leaders can answer yes or no to the following:

- » I know and value my L&D strategic business partner.
- » I have a strategic learning plan that supports by strategy and operating plans.
- » I have partnered with the learning team to secure the budget and resources within L&D or in my unit needed to execute my learning plans.
- » I am actively engaged with my leadership team to drive the change communications and adoption needed for these plans to yield positive outcomes.
- » I see results and will continue to engage L&D to support my business.

Conclusion: Moving Forward

Tamar Elkeles

So what's next? Through the pages in this book and from the expertise of these forward-focused chief talent and learning officers, we've learned that the path ahead requires us to add value to our organizations differently than we did before. These colleagues have paved the way and we are grateful. While we have made significant progress in expanding our roles and overall organizational impact, much more still needs to be done. Now is our time. Uncertainty is driving us all to learn quickly and embrace flexibility. Anyone who isn't learning today will not be relevant tomorrow. Any organization that isn't a learning organization will succumb to disruption.

Innovating, inventing, and adapting are essential for businesses to succeed and grow. That requires a commitment to continuous learning and quickly capitalizing on near-term opportunities. Opportunity motivates experimentation. Risk taking, being uncomfortable with the status quo, questioning—these are the characteristics of tomorrow's chief talent and learning officers.

The past may not have adequately prepared us for “the next.” Instead, the future requires us to learn as we go. We need to think differently and be bold. We must embrace the notion that we are business executives first and talent and learning executives second. We don't just occupy a seat at the table—we lead the meeting!

Our agenda is not predetermined. It is fluid and changing just like our companies and our industries. We must take pride in understanding the business innately and use business data to drive our thinking, establish priorities, and determine critical initiatives. Learning is not something we “do.” It's embedded into every part of the organization and into everybody's work. We don't just manage learning or talent—we lead the organization!

What we've also learned through our journey is that award-winning learning and talent organizations are continuously embracing new ways of working, new strategies, new technologies, new models, and new perspectives so they can be resilient and agile for the long term. Sometimes the most important insights come from outside our industry, profession, and geography. We must leverage diverse thinking and vital inflection points to elevate our important work and deliver even greater business impact. Organizational change begins with us. Every opportunity to increase organizational

productivity and performance is an opportunity to deliver value. We don't just develop talent—we build businesses!

While the collective wisdom and experiences of the chief talent and learning officers who contributed to this book are very different, they all demonstrate that the way to build an award-winning organization is to think, behave, and lead strategically. They are catalysts in developing strategic capabilities across their workforce and within their companies. Independent of their title, functional role, or responsibilities, they leveraged and expanded their field of influence and impact. They didn't wait for an invitation to challenge the status quo. They took the initiative to improve their organizations and deliver business results. They are trailblazers who gave us a road map for how to continuously stay relevant, respected, and valued.

In Peter Senge's groundbreaking 1990 book, *The Fifth Discipline*, he described learning organizations as places “where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together.”

Twenty years later we are doing that and so much more. Here's to the next 20 years and continuing to learn together.



About the Editor

Tamar Elkeles, Ph.D.



Tamar is an experienced Human Resources Executive, Chief Learning Officer (CLO) and thought leader in the talent, learning and organizational development field. She has expertise managing global growth and leading international teams, as well as an extensive background implementing best in class people practices in technology companies. Tamar is currently the Head of Human Resources for XCOM Labs, a wireless technology company propelling the next mobile revolution.

Prior to this role she was Chief Talent Executive for Atlantic Bridge Capital, a global venture capital firm focused on technology investments. Previously Tamar was the Chief People Officer for Quixey, a Silicon Valley tech start-up, and before that was the CLO at Qualcomm. In her nearly 25 year tenure as CLO at Qualcomm she helped grow the company into one of the most successful companies in the world. There she led the development of Qualcomm's workforce, scaling the employee base from 700 to over 31,000 employees worldwide.

She has been featured in several publications including *CLO Magazine*, *Training Magazine*, *T&D Magazine* and *HR Executive* magazine for her leadership and innovative contributions. Throughout her career she has earned numerous awards, including the "Learning Elite Trailblazer" Award (2014), the prestigious "San Diego Women Who Mean Business" Award (1998) and the "Tribute to Women in Industry" Award (2004). In 2010 she was named "CLO of the Year" by *CLO Magazine* and in 2014 was named "Top Influential" by the *San Diego Daily Transcript* for her significant impact and leadership in the technology industry. In addition to her executive roles, she has authored three books: *The Chief Learning Officer*, *Measuring the Success of Learning Through Technology* and *The Chief Talent Officer*.

Tamar is a member of the Board of Directors for GP Strategies (NYSE: GPX) as well as a Board Member for The Forbes School of Business & Technology. She also serves on the *CLO Magazine* Editorial Board and the Association for Talent Development (ATD) Chief Talent Development Officer (CTDO) Next Board. Tamar was a member of The Conference Board's Executive Council on Talent and Organizational Development and also served on the Board of Directors for ATD, the world's premier professional association and leading resource on workplace learning and performance. Tamar holds both a M.S. and a Ph.D. in Organizational Psychology.

SHAPE WHAT'S NEXT FOR LEARNING IN YOUR ORGANIZATION

Our era of dynamic change and its profound impact on personal lives and businesses throughout the world represents a new normal. How organizations learn will determine whether they rise to the occasion and adapt or struggle behind outdated practices and processes.

New or aspiring talent development executives can learn a lot from the best of the best—the high-performing, award-winning companies responding to increased pressure to deliver business value. *Forward-Focused Learning* features contributions by learning leaders who are proactive about making their function the most innovative, the most aligned to business needs, and the most strategic. Rich in examples of what's worked, this book is a must-read for anyone setting learning strategy or managing the learning function. Organized around themes of vision, people, and process, it covers how to:

- Become a strategic business driver.
- Apply a systems mindset to the learning organization.
- Gain support from organizational stakeholders.
- Build a learning team capable of serving the business.
- Do more with the resources you have.

Written by talent development practitioners and consultants at the top of the field, from brand-name companies such as Comcast, Hewlett-Packard, Nike, General Mills, Ford, GE, and Booz Allen Hamilton, this book is your key to gaining a seat at the table.

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