ATD'S FOUNDATIONS

OF TALENT DEVELOPMENT

Launching, Leveraging, and Leading Your Organization's TD Effort

atd

Elaine Biech

More Praise for ATD's Foundations of Talent Development and ATD's Action Guide to Talent Development

"Elaine Biech has that rare ability to translate complex, cutting-edge knowledge into actionable, transformative steps. She has done it again here, shaping the expertise of the world's best thinkers on talent development into a comprehensive, practical guide for unlocking human potential and driving organizational performance."

—John R. Ryan
President and CEO
Center for Creative Leadership

"Given the ever-evolving nature of talent development, I sit better at my desk having *ATD's Foundations of Talent Development* by my side. Whatever that next challenge or opportunity, look here first."

—Chris Ernst, PhD Global Head, People and Organization Potential Bill & Melinda Gates Foundation

"I can think of no one better to guide talent management professionals through the basics of creating a trusted, business-like organizational resource than Elaine Biech. Elaine, along with her amazing 'mega sidebar' contributors, offers a forward-looking, multi-cultural perspective that makes *ATD's Foundations of Talent Development* an essential read for both new and experienced talent managers."

—William (Bill) Shea Director of Corporate Relations-Europe, Harvard Business School Executive Education

"Elaine Biech has outdone herself. ATD's Foundations of Talent Development is the most comprehensive source of wisdom and guidance in the field today. In it Biech offers a holistic view of talent development, beginning with the organizations' learning foundation and ending with the future direction of the workplace. In between are all the resources you'll need to strategize, plan, design, deliver, fortify,

and measure your talent development efforts. Personally curated by the industry's leading authority, it is at once practical and artful, rigorous, and easy to navigate. This book is a masterwork and a stellar achievement, and it is destined to become the professional standard of excellence. Five gold stars for the book and very high fives for Elaine Biech."

—Jim Kouzes Co-Author, *The Leadership Challenge* Dean's Executive Fellow of Leadership, Leavey School of Business, Santa Clara University

"Prepare your organization for the future with this strategic guide for talent development. In a message that is both sobering and empowering, Elaine Biech, the world's leading training expert, offers a complete blueprint for organizations committed to innovation."

—Kimberly Cline, JD, PhDPresident, Long Island University

"ATD's Foundations of Talent Development is a valuable resource for any talent professional looking to get smart on how to lead talent development in today's organizations—a crucial textbook for someone new to the profession and a helpful review for seasoned talent practitioners."

—Liz Wiseman Executive Advisor, Researcher Author, Bestsellers *Rookie Smarts* and *Multipliers*

"Ever practical and pragmatic, Elaine Biech offers easy-to-implement, innovative approaches for starting and improving a TD effort in your organization. If you purchase only one book about talent development this year, this should be it."

—David M. R. Covey
CEO, SMCOV
Co-Author, *Trap Tales*

"ATD's Action Guide to Talent Development is in my opinion the seminal and most comprehensive text on the subject of talent development. This practical guide to developing and implementing your TD efforts is a must-read, especially in these times of record low unemployment and an increasingly fungible workforce. Elaine Biech draws from her vast experiences working with best-in-class organizations around the word, and synthesizes them into a well-thought-out actionable framework. Her emphasis on building a learning culture and positioning the TD function as a strategic partner is spot on!"

—Michael R. Cunningham, PhD Chancellor, National University System

"In the world of training and development, the inner circle knows that Elaine Biech is an endless fountain of energy, enthusiasm, and applicable knowledge. Your talent department will be in the absolute best hands as they follow her scrupulously thought out road map to success."

—Juliet Funt CEO, WhiteSpace at Work

"ATD's Action Guide to Talent Development is an encyclopedia and kaleidoscope for talent development. The holistic view from the ecosystem, the future, and business perspectives provides a profound resource for TD professionals to develop into true trusted advisors. I learned from Elaine not only about the design and delivery of programs, but how to understand and articulate the business context with foresight and insight to engage with business executives to help them navigate the challenges by building organizational health and sustainability through talent."

—Pamela Wu Director Global People Development VMware Beijing "As a team builder and leader throughout my career, the core and essential elements for success are identifying, recruiting, training, and retaining the multi-disciplined team required. *ATD's Foundations of Talent Development* clearly and succinctly focuses on each detail as only Elaine can, illuminating what others take for granted. This is why she is always a critical part of the development of every team we build spanning the past 20+ years."

—Rear Adm. Gib Godwin (ret.) President, BriteWerx Inc.

"If you only have one book on talent development on your shelf, make sure it is *ATD's Foundations of Talent Development*. The collection of world-class expertise and insights from professionals around the industry cannot be matched anyplace else. A master at simplifying the complex, Elaine has done customers and the industry a favor by putting the most important aspects of talent development in one place in a clear and understandable package!"

—Will Brown Talent Manager, Office of Naval Research

ATD'S FOUNDATIONS OF

TALENT DEVELOPMENT

Launching, Leveraging, and Leading Your Organization's TD Effort

By Elaine Biech



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For Shane and Thad

My first talent development efforts

IMPLEMENTING TALENT DEVELOPMENT

TALENT DEVELOPMENT PROFESSIONALS ARE TRUSTED ADVISORS WHO PROVIDE GUIDANCE



- · Instill the Value of Lifelong Learning
- Discover the Power of a Learning Mindset

- Manage the TD Function Like a Business
- · Balance Services and Budget
- · Leverage Technology for Learning



- Design and Deliver

 5 Contemporary Learning and
 TD Services
- Nurture Innovative Design and Delivery
- Select the Most Effective Formal Learning
- Encourage Learning From Others
- Sustain Learning on the Job

- 7 Define and Measure the Impact
- Demonstrate the Impact of Talent Development
- Identify Evaluation Methods
- Start a Meaningful Evaluation Process
- Plan for the Future of Evaluation

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FOREWORD

As a lifelong learner always looking to gain new insights and wisdom about the world in general and the workplace in particular, I was thrilled to see so much outstanding content about talent development in one place. It is a crash course taught by the best in the field, invaluable for even highly experienced practitioners and indispensable for the novice or midcareer TD professional.

My first experience in the learning field was as a public high school teacher. Later, as I began searching for a different pace and challenge, I became an instructional designer and facilitator, progressing through the ranks in corporate learning. Many years and hard-earned wisdom later, I'm privileged to lead a high-performance group that oversees talent development and more for nearly 90,000 employees globally at SAP.

Throughout my career I've found that seeking out new ideas and thinking has been imperative to my success, and a collection like this is a gold mine. Following are some reflections I invite you to consider as you delve into the chapters ahead.

Run Your Talent Development Function Like a Business

To be successful, we talent professionals must approach our role more like our stake-holders approach theirs. By this I mean seeing everything we do as an investment of resources that yields valuable outcomes for which we are accountable. One crucially important distinction, however, is that the customer—the business stakeholder purchasing our services and solutions—isn't always right.

In fact, the customer is often deeply mistaken. For example, when they:

 Ask for talent solutions without having analyzed whether what they are facing is a talent problem. (Instead, it could be a systems issue, mismanagement, flawed logistics, and so on.)

- Demand we address a challenge, but fail to clearly define it or identify specific target outcomes.
- Direct us to achieve target outcomes without tying them to strategic organizational priorities.
- Do not require that we measurably meet stated objectives—which is perhaps most troubling of all.

Two things will safeguard us from the perils of serving misguided customers: knowing our job and knowing our value. Too many senior executives have come to expect too little of talent leaders and organizations. We must show them otherwise. This starts with understanding how the talent function can be a strategic tool that furthers your company's performance objectives. Then you can create the systems and processes that will get you there. For example, develop an intake document (or screen) that requires the customers to define key performance indicators before they can request your services. You may be pleasantly surprised to find that your stakeholders appreciate the seriousness with which you take your work and value, as well as the extent to which you are asking to be held accountable.

Feeling Uncomfortable? Fantastic!

To gain the requisite understanding of function and value, you need to become comfortable with the unfamiliar. I'm not naturally a numbers person, but I knew that I needed to prove to my stakeholders that I was making a difference. So, I became a data nerd and wrote two books on the subject. This idea is the heart of section VII, on defining and measuring the impact. Neglecting to master this subject seriously damages talent development's positioning as trusted advisors—something worthy of financial, logistical, and cultural prioritization, as well as being essential to the organization's success.

TD professionals must also keep a firm grasp on worldwide economic trends. We will only be as effective as our understanding of what keeps our senior leaders up at night. Indeed, those very same things should be keeping *us* up at night! How can we truly say we are responsibly developing our employees if we're not tracking trends in artificial intelligence and automation, and thus can't carefully discern between alarmist proclamations of robots taking our jobs and practical predictions of what's ahead and how to respond?

Along those lines, you also need to stay as informed about your industry and your company as your CEO. To be a strategic partner, we must bring strategic ideas to the table; this means mastering our business domain, and not just our silo. After all, talent development is not an end in and of itself, but rather a means to make our organizations successful. We need the proper context and defined objectives to inform our work, so that we can empower individuals and teams to drive our companies to achieve their strategic goals.

Don't Just Read, Act

Elaine has done a great service in her approach to this volume. She has not only gathered many of the finest minds in our field to provide authoritative guidance, but also very thoughtfully arranged the book to include easy-to-consume summary introductions and closings, checklists, and tables. And, she's gotten more than 90 thought leaders from a dozen countries to write sidebars in their areas of expertise. Chunked content in an analog book? You bet.

Start in the middle, or at the end, or at the beginning of this book. Read an entry or a section at a time. Set aside 30 minutes every day for the next month, and dedicate it to reading, highlighting, taking notes, and creating an action plan to put your new ideas into motion. I also urge you to follow the excellent advice in chapter 33, "The Workplace of the Future," to read blogs, journals, and other publications that focus on workforce trends. There, too, take notes and integrate what you learn into how you work and lead your team.

Doing so will model for your team and organization what it looks like to develop talent for new job demands. By keeping up with changes, you can inspire others, advance people's talent development careers, and become increasingly essential to your organization.

Whether you seek practical approaches to beginning your talent development journey, or fresh insights to further develop your efforts, this book is for you. I hope you find inspiration and motivation as well as information in this treasure trove of world-class expertise, and I wish you enormous success as you bring these ideas to life.

—Jenny Dearborn Senior Vice President and Chief Learning Officer, SAP September 2018

ACKNOWLEDGMENTS

A colossal thank you to all our contributors—all 92 of you! What a team! You responded quickly, happily, and with some of the most exciting and well-written grand megasidebars ever! Although they may appear in only one of the two companion books, they influenced both. Thank you for making this book a delight to read and practical to implement. You will find all contributors listed in appendix C.

A special thank you to everyone at ATD who recognized the guidance that this book would provide to define the broader scope required of talent development professionals. Thank you to the ATD Think Tank Team—Avra Bossov, Justin Brusino, Kristen Fyfe-Mills, Elizabeth Hannah, Jennifer Homer, Deborah Hudson, Tim Ito, Melissa Jones, Kristine Luecker, and Jason Sturges—who helped to create the vision and purpose for the book. I am thankful to Maria Ho and her team for the research that filled in the data gaps. Thank you to Kristen Fyfe-Mills, whose brilliant idea to invite me to attend the ATD BEST Awards uncovered extraordinary talent development experts with practical and creative concepts.

Thank you to ATD's editorial team: Kathryn Stafford, for helping to develop this book to its useful stature. A special shout out to Melissa Jones, who condensed my verbose text and ordered my words into meaningful messages. Thanks to Caroline Coppel, who reviewed the book and ensured all our references were complete. And Justin Brusino, who is as excited about this book as I am—thank you. Justin, you always deliver the right feedback, at the right time, for the right reason.

A huge thank you to those who relentlessly worked behind the scenes to chase down details, signatures, and answers and went above and beyond to ensure this superspeed book came in on time: Samuel Hyland, Accenture; Kelly Lombardino and Shaun Martin, CCL; Mara Katsikis and Amy Federman, Conant Leadership; Evan Sinar and Rachelle Thomas, DDI; John Kostek, Hitachi Vantara; Sowmaya A.H., Infosys; Sarah

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Last, but certainly not least, I am bursting with gratitude for Dan, who was more patient, for a longer writing period (72 chapters' worth), for a greater cause.

INTRODUCTION

Starting a talent development effort in an organization is a challenge with minimal guidance available about how to do it. This book presents the concept of how to launch, leverage, and lead a talent development effort for your organization. Not every detail is included within these pages, but you will gain ideas that answer how to get started, how to keep going, and what to plan for next.

Professionals in the learning and development field have seen our roles change dramatically in the past dozen years. The expectations of our employers, clients, and customers have escalated rapidly. Most of us have not kept up with what's expected of us as we moved from the proverbial order-takers to trusted advisors. As trusted advisors, we provide guidance to the C-suite and support the entire organization. It's an exciting and a scary place to be.

The eight-step framework of this book focuses on the trusted advisor who is responsible for leading workforce development and ensuring that talent helps the organization achieve its strategic goals. Trusted advisors focus on the issues that matter to the business, do what they promise, communicate effectively, build relationships of trust and respect with line managers, and demonstrate a willingness to lead innovative development solutions that create value for the business.

Leaders face rapid change, environmental complexity, competitive global markets, and quickly evolving technology. In the midst of this turmoil, they must also focus on maintaining cultural alignment and meeting the growing expectations of customers and employees. Trusted advisors often serve as consultants and a sounding board to leaders. They are confidants providing authentic communication and insight.

Why This Book?

The American Society for Training & Development changed its name in 2014 to the Association for Talent Development (ATD). Since that time, much has been written

about talent development, so why another book about developing people? I had three reasons for writing this book:

- To present the most important talent development content in one convenient place—a curated talent development library, if you will.
- To arrange all the moving parts of today's talent development efforts in one
 logical framework—one that helps us understand what we should think about
 first, next, and onward. Believe me, I have no preconceived notion that you will
 always be able to follow the sequence—or that you actually should. It's a framework to consider.
- To showcase experts and practitioners in the profession who are on the edge of presenting new ways to look at talent development.

This book pulls together all the information you need in a logical framework. Each chapter is designed to help you understand what to consider and in what order. Knowing what and when to launch talent development in your organization is critical. But it's even more important to understand how. This is the most exciting part of the book. The content is enhanced with examples, ideas, and advice from those who are in the field doing the work.

The book is also filled with content from recognized leaders who have contributed expert essays (what I originally called "grand mega-sidebars") based on their unique expertise. These informative essays vary in length, but most are longer and more in depth than the average sidebar. Because each one features the expertise of individuals who have deep knowledge about a concept, theory, model, or idea, you will learn much in a short space. Practical suggestions, innovative ideas, and road-tested recommendations come from experts in our field, luminary leaders, ATD BEST Award winners, and educational researchers. The content offers the what-to-do, but the contributors have delivered the how-to-do it. The sidebars are filled with ideas and nuggets of wisdom; all are helpful and many are inspirational. Some are downright magical!

- The book taps into the experts in our field, such as Michael Allen, Diane Elkins, Jennifer Hofmann, Cindy Huggett, Karl Kapp, Jim and Wendy Kirkpatrick, Jack and Patti Phillips, Becky Pluth, and Lou Russell.
- The book shares advice from luminary leaders in leadership and development, including Ken Blanchard, Dianna Booher, Tacy Byham, Marshall Goldsmith,

- Kimo Kippen, Beverly Kaye, Elliott Masie, Cindy McCauley, David Rock, Peter Senge, and Jack Zenger.
- The book presents lessons learned from ATD BEST Award winners such as Hitachi Vantara, IBM, Infosys BPO, Nicklaus Children's Health System (formerly Miami Children's Health System), Moneris, TELUS, U.S. Security Associates, Verizon, and Western Union. Other companies such as Accenture and Ferguson PLC are also represented
- It presents the newest thinking from university educators and research groups that we have relied upon for years, including Robert Brinkerhoff, Edward Lawler, John Medina, Dave Ulrich, and organizations such as CCL, Bersin by Deloitte, and DDI.
- The book's reach is worldwide—with authors and organizations representing Canada, India, the Netherlands, Turkey, and the United Kingdom.

My hope for you is that the information in this book will take on a new meaning for you by being presented as a holistic approach to launch, leverage, and lead your TD effort.

I tried to pull the best advice and practical approaches from more than 200 books; 32 ATD research reports and case studies; four years of *TD*, *HBR*, and *Forbes*; and more than 1,000 other research papers, articles, and blogs. There is literally tons of great stuff available. I tried to sort through the noise for you to glean the best thinking. Consider this book your personally curated copy of talent development from start to finish.

This book has a companion, ATD's Action Guide to Talent Development. Why? Well mostly for all the reasons you just read. We as talent development professionals need to know so much that one book became two! While this book focuses more on the what and why than the how, the action guide puts a solid focus on the how, with even more suggestions for how to implement each phase in the framework and more practical checklists, tools, and assessments. To make it easy, the sections remain the same in both books.

We Need to Know It All Now!

The greatest dilemma in writing this book was deciding on the order of the topics. As talent development professionals, we need to know many things—and we need to know them now!

There are so many things that need to be done—and sometimes you'll feel like they need to be done at the same time. In fact, everything does need to be done at the same time. You need to create a vision for the future, and at the same time deliver learning for today. You need to help others learn while learning your own skills. You need to design and deliver what your organization needs today, while at the same time strategizing for how to bring other options into the ecosystem for tomorrow's needs. In some cases, it's an iterative process. At other times, it *all* needs to be done *now!*

Talent development curation, for example, is one of those topics that can fit into quite a few places in the framework. We could have discussed it in chapters 1, 5, 9, 14, 18, 19, 24, or others. This overlap is positive because it models what we as TD professionals need to improve—seeing the holistic view of learning. On the other hand, it makes everything more complex; after all, you can't talk about everything at once and ensure it makes sense! This emulates exactly what our organizations are facing in the VUCA world.

In another example, we discuss the learning ecosystem in several chapters, because that is where much of what we do comes together. It's good in many ways because it shows how closely all the topics are related. In chapter 6, we discuss building a business case, focusing on the perspective of "selling" it to senior leaders to implement a talent development effort. However, business cases may also be used once a TD effort is entrenched in an organization; or, they could be used to present the annual plan, a unique project, or anticipated changes for the organization. All follow the same format and have the same rationale, making it difficult to know when to introduce the topic of business cases.

Once we accepted that even though we need to know everything now and that it isn't possible, we still needed to decide how to order the book. It could have been aligned by individual role, by function, in sequence of events, or by evolutionary progress. I chose the last option. To ensure the book accomplishes what it espouses, it must follow the process. Here's an example: Partnering with business is critical for success. This partnering occurs throughout the process: early, when you are gathering data; midstream, when you are deciding what services you'll provide; and during rollout, after you have created options for employees. You will read about successful rollout campaigns in chapter 9, even though you don't actually design and deliver learning opportunities until chapters 20-23.

As I said, we need to know it all now!

How This Book Is Designed

The book focuses on the TD professional's role as a trusted advisor who provides guidance, leadership, and direction for establishing and implementing a talent development program in an organization. Content is presented in eight sections and 36 chapters. Each section builds upon the previous section. This means that you can review the table of contents and choose to begin where your organization is in its development.

Starting with identifying and clarifying the organization's learning foundation, the framework helps to guide you through the eight sections. In the past, most of us in talent development would likely have gravitated toward section V, Design and Deliver Learning. However, based on work by Peter Senge, the Center for Creative Leadership, ATD, and others, we know that a solid foundation is critical if a talent development effort is to succeed and flourish to make the organization more competitive, innovative, and agile. Therefore, the framework begins with the organization's learning foundation.

Many of you already have a fully operating talent development department. If that's the case, you may glean nuggets from different sections of the book. Or you may find an area where you want to strengthen the processes or another where you need to insert some energy and vitality. You will find ideas here.

On the other hand, some steps within the model are truly for talent development efforts that are just getting started—perhaps a new company or a small company that has finally reached the size or threshold that requires initiating something more formal than it has used in the past. In still other situations, an organization may have maintained a learning department for decades, but organizational life and the focus of development have changed. That organization may simply be looking at what areas it needs to shore up or how to better utilize its resources and delivery options. And other organizations' talent development efforts may be fully implemented, but not as successful as they could be. In instances such as these, I've found that the lack of success is often due to skipping a foundational step and plunging in at a higher level, perhaps thinking that understanding a learning culture wasn't worthy of review time or exploring the best ways to form a business—talent development partnership isn't necessary.

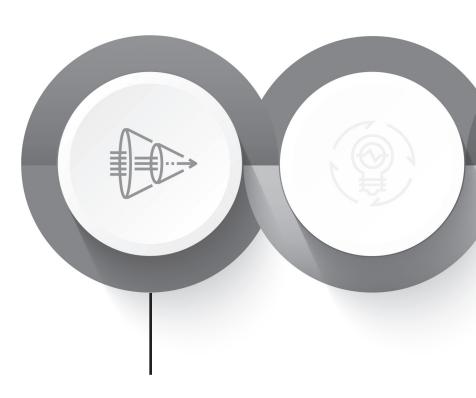
What does this mean for you? You can jump in wherever you think is most beneficial to your organization. Let's overview the eight sections:

- 1. Identify and Clarify the Organization's Learning Foundation explores the base upon which you will create your talent development plans. The section begins by exploring the definition of a learning culture. It then adds leaders' roles and what employees value that lead to learning and development. One chapter introduces the mental attitude of development, such as learning agility, coaching, learning to learn, and other topics that help create an organization's "learning culture." It ends by clarifying your organization's readiness to launch a talent development effort.
- 2. Develop a Talent Development Strategy focuses on how to align with the organization. You'll explore the value of developing a business case and suggestions for completing one. You'll learn ideas to be successful when you partner with business. You will also review how talent development professionals can enhance their organizational and industry savvy, and why they need to broaden their view of talent development's purpose.
- 3. Create an Operating Plan addresses the business of learning. Operating a talent development department like a business requires alignment, governance, management, budgeting, and leverage of the TD ecosystem. This section covers all these business topics.
- 4. Reinforce an Organizational Talent Development Mindset is a section that begins to take you to the next level of talent development to best support today's learner. It explores how to grow your organization's learning culture and how your organization learns. The section presents the important role managers have to develop their employees and the important role employees have to own their development. It ends by focusing on talent development professionals as consultants.
- 5. Design and Deliver Learning is the section that many talent development professionals think of first. It addresses formal learning (virtual and traditional), learning from others, on-the-job learning, and onboarding plans. The opening chapter explores contemporary design and delivery. The role of talent development is becoming more of a service-oriented role, and TD professionals need to be prepared to provide services such as performance consulting, coaching managers, leading development strategy, instilling agility, and facilitating change management efforts.

- 6. Fortify the Learning is a section about ensuring the knowledge and skills learned are used. It includes topics such as empowering employees to be lifelong learners, enabling social learning, coaching managers, fostering continual self-learning, and developing talent development staff to be trusted advisors.
- 7. Define and Measure the Impact of Talent Development is a critical topic for talent development professionals. Determining that the learning has an impact for the organization is crucial, yet we have not mastered this topic as we should. You will explore the usual topics such as evaluation methods and how to get started with evaluation, but we will also examine several new ideas and consider evaluation's future.
- 8. Prepare for the Future includes topics such as the workplace and workforce of the future. We will review talent development's future trends and the important role you play in guiding your organization's future.

Whether you are a one-person department or the manager of several talent development departments, whether you work for a company of 100 or 10,000, whether you are in one location or multiple locations across the globe, you'll find concepts and tools you can use in this book. It doesn't even matter if you are in a traditional talent development role. This book is for anyone who has an interest in starting and shaping a system that is larger than the traditional learning focus. It will take you through the what and why of talent development. It will suggest how and ask you to consider what's next to start a talent development program. It will show you what works and will help your organization take a systems view of learning to become more flexible, agile, and innovative while completing the vital task of developing your employees.

SECTION I



Identify and Clarify the Organization's Learning Foundation



Identify and Clarify the Organization's Learning Foundation

There are many ways to build a learning organization, and they all require management to lead. If you build a culture that gives people time to reflect, develop, and share expertise; stay close to customers; and learn from mistakes, you will outdistance your competition and thrive.

This first section introduces you to the foundational elements you might find in a learning organization. You will explore how leaders champion learning, why it is important that all employees value learning, and the effect that a positive, growth mindset can have on an organization. Leaders and managers need to take responsibility for coaching, mentoring, and developing their employees. Employees need to accept accountability for developing their own careers. Leaders who inspire a growth mindset from the top down will encourage a learning culture. Talent development professionals provide support and need to introduce concepts such as learning to learn and learning agility. These kinds of actions create the foundation for a learning organization.

Who better than Peter Senge to lay the foundation for this book? One of the key founders of our field, Senge is considered by most to be the father of the learning organization concept (Dumaine 1994). In fact, in 1997 *Harvard Business Review* named his book *The Fifth Discipline* one of the seminal management books of the previous 75 years. Among his many other accomplishments, he was named Strategist of the Century by *The Journal of Business Strategy* in 1999, one of the world's top management gurus by *The Financial Times* in 2000, and one of the top 10 management gurus by *BusinessWeek* in 2001.

Author of numerous books, Senge lectures extensively throughout the world and leads the communication of learning organization ideas among the largest companies in the world. Senge hit a nerve deep within the business and education community by introducing the theory of learning organizations in the first edition of *The Fifth Discipline* (1990). More than a quarter of a century later, many experts and leaders are still trying to determine what is required to ensure the organization continues to learn. Are diverse perspectives sought? Is it safe to speak up? What happens when a mistake is made? Is the organization open to new ideas? Is there time for learning and reflection? And if these are important to create a learning culture, what infrastructure is required to augment the

learning culture? In this new essay, Senge discusses the organizational changes he's seen since he wrote his groundbreaking book.

Learning Matters

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Much has changed in the decades since I wrote the first edition of *The Fifth Discipline*, and in another sense very little has changed. The deep social and ecological issues our societies face have, if anything, worsened. Uncertainty, disruption, and anxiety have probably grown. But so too have systemic innovations—for example, in key industries like food and energy, where some national governments are pursuing aggressive de-carbonization strategies. In business, the basic confusion persists that a business's purpose is to make a profit, but there have also been innovations, like the global explosion of social enterprise, new concepts in corporate governance like B-corps, and even those in some pockets of banking, money, and finance. You'll find links to more information about the sustainable food lab network involving many of the world's largest food companies and the global alliance for banking on values in appendix B.

If anything, more and more organizations and industries appreciate the need for deep and ongoing learning—individually and collectively. This shows up in a stronger desire to ensure that people have the support they need to learn and grow as they work. More important still, I find that many more organizations are embracing the idea of collective learning, and recognizing that this requires deep shifts in traditional cultures oriented more toward controlling than learning. When I wrote the first edition of *The Fifth Discipline*, it was clear that team learning was where the rubber met the road in this cultural shift (thus, it was one of the core disciplines). But there was much less focus on teams back then, whereas today almost all work is done in teams.

As these changes continue to unfold, talent development professionals will have an important role to fill for their organizations—first, to show how developing new learning capabilities helps achieve your organization's goals, and second to help managers create a learning climate and culture.

Learning as an Organizational Imperative

Peter Drucker once said that organizations exist so people can do together what they couldn't do separately. That's a good definition of an organization. It's about coming together to accomplish things we can't do alone, to create something that matters to us.

This clarifies the first question—learning for what? A clear sense of shared purpose is a cornerstone for building a culture or climate to ensure that we are not just building individual capacity, but instead learning and developing collectively. Not surprising, the particulars of such a culture will depend on an organization's distinctive history and will vary from industry to industry. But there are some industry settings where this whole learning philosophy and cultural precept is becoming a way of life. One example is in the software industry, where the difference between success and failure in developing new software products lies in the mantra, "Fail fast and fail early."

How many organizations are willing to embrace a fail-fast method to learn? Probably not many. In the software industry there isn't much of an option, because the complexity of the environment is often beyond what anyone can understand. Industry insiders believe the threshold was crossed a decade or more ago, once no one knew how a new software element or product would work when placed into these environments. When this started to happen, the intended effects of a new product could be swamped by unintended effects. This is an operational definition of complexity and is very different from simpler mechanical products. Imagine if you did not know whether a new steering wheel would move a car left or right!

Facing this reality, software engineers, who often work in online teams that involve hundreds of developers and customers, had no option but to take small steps, gather information, and reflect on what was working and what was not in a very disciplined way. This illustrates the basics of the Agile methodology that now pervades the industry. It's like walking in a very dark room, where you have no option but to take small steps and pay very close attention to what happens.

But more broadly, the evolution in the software industry reflects the first principle of learning in general: no action, no learning. You can sit around and talk all you want about walking, but you're not going to make any progress until you actually start to walk. And then, the only thing you can be sure of is that you will make mistakes and the outcomes will not match your goals. Success or failure does not depend on avoiding

mistakes, but on learning effectively from your experience.

Truthfully, I think there is a lot of lip service paid to allowing failure. I know that it is frustrating to those of you in the talent development profession, but we shouldn't be too concerned about it. It's always the case that new ideas catch on and people talk about them first. As more and more people start to buy in to the new idea, the buy-in usually starts coming faster than people can develop the skills needed to succeed with the new idea.

Helping Managers Create a Learning Climate

At some level, a more learning-oriented culture can only be shaped by frontline managers. Executives can give speeches but they do not shape the day-to-day work environment. Because line managers are accountable for success and failure in accomplishing organizational goals, talent development professionals must partner with them to help them build a learning climate. Not all will be equally predisposed, but as pragmatic managers start to see the connection between learning and results, many will become more open.

In general, you can help managers do three things that matter:

- Help employees tap into their sense of purpose. Managers have to find a way to evoke a sense of purpose and answer questions like, "Why do I care about what we are doing?" and, "How does this work relate to my own sense of identity and what I care about?" Beyond whatever is expressed in the corporate value statement, managers need to connect the daily work environment with people's sense of values and purpose, so that their work becomes meaningful. If you can't do this, employees will see their work as "just a job" and invest just enough to make enough money to do the other things they care about beyond work. Of course, this is an old idea—Douglas McGregor's Theory X, Theory Y from the 1950s. I've always felt that McGregor was correct that, at a personal level, most employees want to do something that matters to them. They seek commitment in their work. If anything, I think this is truer than ever today, especially for younger workers.
- Create teamwork and build learning teams. Starting with their own teams, managers can find many ways to help teams work better together. Do people have a shared sense of purpose? What is the quality of communication,

especially around complex issues with different viewpoints? Are people having fun and creating something meaningful to them? Do they roll up their sleeves and enjoy addressing the day's challenges? Do they trust and respect one another? Or are people simply playing internal politics and doing what they are assigned to do because, "That's not our job anyhow!" Most people prefer a work environment that is collaborative and energized, where they can see the larger systems they are part of. But building that environment is hard, neverending work—and little happens without the leadership of local managers.

• Help employees see themselves as autonomous within a larger organizational context. Meaningful work usually balances autonomy with responsibility for larger systems. People want to feel a sense of independence in their daily work; it's part of what it means to be a professional. We also play our role within larger systems. Successful managers allow and encourage employees to make decisions that demonstrate autonomy and accountability. But to do that, employees need to have the opportunity to step back and see the larger systems they are part of, as well as the opportunities to work on something at this higher level. Managers play a big part in whether this opportunity happens, such as through giving people regular chances to stop their work and confer with other teams in other parts of the organization around issues that go beyond their immediate sphere.

What prevents these commonsense actions? It's usually the perception of control. Our hierarchical structures often convey a subtle message that managers must be in control. They need to have the "right" answers for their bosses, which often forces them to manage in ways that are part substantive and part perceptual—for many, above all else, creating this perception of control. But control is a fantasy. No one can be in control of another person. Look at your teenagers—can you control them? We cannot be in control of everything in our organization, because organizations are living systems with many interrelated parts. They can't be controlled like you would control a machine. But they can be influenced.

The only thing that has shifted in the software industry is the steady surrendering of the illusion of control, which becomes increasingly untenable in the face of growing complexity. But in many ways this is true of all living systems. No one is in control of

a forest. The image of control in management is really a by-product of seeing our organizations as more like machines than living systems, just one cultural offspring of the industrial age.

The premise of the learning organization is that we have a climate of autonomous, interconnected human beings. You can't control human beings. But you can create disciplines that will help them learn more and learn it more reliably and rapidly.

Talent Development Can Make a Difference

Most people in the talent development field are there because they want to make a difference. The biggest problem they face is getting out of the old paradigm of training versus learning, of counting "butts in seats" to measure success versus connecting to deep sources of organizational success. This requires building partnerships with managers that genuinely add value to your organization.

First, you need to determine how you intend to contribute to the organization's success. What is the enterprise trying to do? How can what you know add value? How can you gauge whether you are making a difference? How do you know if you are supporting the right part of the organization? There is no way to answer these sorts of questions except through communicating with line managers you respect and who share your commitment to talent management making a difference. They are the real customers. Do you have a closed feedback loop between learning activities and their value as viewed by the managers?

Managers are people accountable for results produced by others—so they have a big stake in how people work together to deliver business results. Although many do not see this, it follows that they must be ultimately accountable to develop people so that they can work better and better together. Help them see this critical connection. Make sure that managers have access to good coaching and mentoring so they can master the ability to create a learning culture and develop their people.

Second, insofar as training is part of your responsibility, make training more and more about genuine learning. This means creating workshops that focus on meaningful practice with tools that help teams learn, having people working in groups on real problems and real issues. All learning is hands on. I don't like to say *action learning* because *all* learning needs to be action learning. Learners need to spend time reflecting on what they've learned. This also means creating learning environments where undiscussable

subjects are discussed and working with people to make these same shifts in day-to-day work settings.

Of course, learning in a workshop setting differs from learning a real work setting. Real learning is always contextual: developing capacities to produce the outcomes you seek in settings that matter. This means creating infrastructures that reach beyond the workshop, like individual and team coaching. These infrastructures can only be implemented with real cooperation and leadership by managers—after all, these are real-time solutions in the workplace, not exercises in artificial environments like workshops. This again will come back to the quality of partnerships you build with line managers.

The talent development field has made great strides in past decades, but there is still much more to do. Continue on the path you're on to ensure you help employees gain the knowledge and skills they need to improve their performance, so organizations can achieve their strategic goals. Help your organizations build a learning climate where employees can work, learn, and grow in their regular work. Work with your managers and leaders to create this learning climate. Human development is not sufficient to create a learning culture, but it surely is necessary.

When Dame Barbara Stocking retired as an esteemed president of Oxfam, one of the most influential social justice organizations in the world, she made a simple observation to me reflecting on her career: "I have always been a developmentally oriented manager. I always believed that you do not 'produce results,' you help grow people who can produce results."

This simple truism still stands a long way from the management mainstream. Help close the gap.

Your Organization's Learning Culture

Talent is at the top of what many leaders value. It also tops the list of many leaders' concerns: "Identifying and developing future talent" was the most important skill required of leaders over the next three years, according to the *Global Leadership Forecast 2018*, which surveyed more than 2,000 organizations worldwide (DDI, the Conference Board, and EYGM Limited 2018). To have a competitive advantage, an organization must identify, develop, and unlock the potential of its employees. A learning culture increases efficiency and employee satisfaction, develops a sense of ownership and accountability, creates a culture of knowledge sharing, and develops an enhanced ability for employees to adapt to change. *Harvard Business Review* describes the advantages of a learning culture as "improved innovation, agility, and organizational learning" (Groysberg et al. 2018).

As a trusted advisor to your senior leaders, you will want to describe the relationship of a learning culture to talent development. You will also want to provide evidence of the value of a learning culture and examples relevant to your organization.

Leading the Change in Talent Development

In the past (and even today in some organizations), when the topic of talent development, training, or learning arose in conversation, the immediate discussion focused on classes and catalogs. But the workplace has changed immensely. That is not to say that formal training (for example, workshops, college courses, and instructor-led training in virtual and traditional settings) is no longer valued. In fact, it continues to play a critical part in learning. The change is that more emphasis is being placed on the other ways employees learn: on the job and from others.

And this change is accompanied by a different view of learning. Employees expect to learn constantly. The workforce is more mobile and transient than in the past; if employers do not demonstrate that they value talent and development, employees will leave to find one that does. Today more and more organizations see the value of talent development. The implication is that we, the leaders in learning—trainers, talent development professionals, employee developers—need to upgrade our skills and lead the change. We need to stay involved with and informed about the significance and meaning of talent development for our organizations and our employees.

Organizations are changing rapidly, and with that change comes a need to develop employees at an even faster rate. Because organizations can't always define the skills they will need in the future, part of talent development is preparing for uncertainty by encouraging employees to participate in development opportunities. Talent is critical to organizations if they want to stay ahead of their competition.

Employees who are interested in career development take skill enhancement, training, coaching, or mentoring opportunities seriously. They want to build skills and acquire knowledge, and are involved in development opportunities to stay up-to-date on the most recent industry innovations. Skill and knowledge improvements are essential to maintaining expertise that matches changing times. Talent development prepares employees to become reliable resources that benefit the organization.

Talent development is a joint effort between employees and the employer to upgrade existing skills and knowledge in expectation of future requirements. Employees gain skills professionally (acquiring job-required skills) and personally (improving communication skills), so they benefit both on the job and off. Talent development efforts enhance employees' knowledge and increase the productivity of organizations.

Learn by Asking Questions

Are you new to the organization? Is your organization new to talent development? It is important to understand your organization's perspective on learning. Knowing its strengths and weaknesses will help you with your planning. Knowing what your organization lacks that a talent development program can supply is also critical. This requires discussion throughout the organization.

The best thing for you to do at this point is to select respected leaders and interview them. Ask questions about your organization's needs and how much its leaders value learning. Find out why the organization is interested in talent development now. Chapter 5 includes questions you can ask to begin understanding your organization's needs, desires, and readiness to initiate a talent development effort. Your interviews will give insight into your organization's learning culture and help define the strength of the foundation on which you will build.

Tie Talent Development to the Organizational Strategy

Talent development programs ensure that employees gain knowledge and skills to improve their performance so that organizations can achieve their strategic goals. We can say those words and mean them. Yet organizations continue to struggle to create a talent development strategy that has a real impact on the business. Without a strategy, organizations lack the guidance necessary to design and deliver effective learning programs that boost both individual and organizational performance.

According to 439 learning and business leaders from more than 20 countries surveyed by the Brandon Hall Group, 14 percent of companies say they have no talent development strategy at all. And it seems that size matters—24 percent of companies with fewer than 1,000 employees report no employee development strategy, compared with 7 percent of companies with 10,000 or more employees lacking a development strategy. However, even within organizations that do have a strategy, many do not believe it helps achieve organizational goals (Brandon Hall Group 2016). This translates into wasted money and energy.

When examining the presence of a global learning strategy, the situation is worse. Eighty percent of the responding international organizations did not have a global learning strategy, according to a survey of 200 learning and development senior decision makers by Open University Business School (Asher 2017). "The Challenges of Global L&D" survey also states that half of L&D decision makers believe that learning is not viewed as important, and 42 percent cite a lack of direction from the top.

"L&D is often seen as a 'token' activity and that is the underlying philosophy that top managers have about it," says Bernd Vogel, director of the Henley Centre for Leadership at Henley Business School, in the report.

Fortunately, most of the companies surveyed in the two reports recognized the importance of a talent development strategy and were focused on doing something about it. More than half of companies said they were ready to begin aligning the learning strategy with the business strategy. Most significant was that high-performing organizations—which saw year-over-year improvement in revenue, employee engagement, customer satisfaction, turnover, and organizational productivity—were even more prepared. High performers are in a better position to make these changes because they are far more likely to have an effective learning strategy already in place; 66 percent stated that their strategy was either effective or very effective in helping achieve business goals. High-performing organizations are also 78 percent more likely to have an effective L&D strategy (Brandon Hall Group 2016).

Further, a study conducted by ATD found that 88 percent of respondents believed that aligning learning and business goals was a relevant challenge for organizational talent development needs (Rothwell et al. 2015).

Embrace the lessons learned in these studies. Make it a priority to align your talent development plans to the organizational strategy.

Six Elements for a Successful TD Foundation

Successful efforts don't just start with action; they have a solid foundation or key underpinnings in place from which they start to build. Before you design your talent development program, you would be wise to ensure that the foundation for your TD effort is formed and on solid ground. The foundation comprises six elements:

- Work constantly toward developing a learning culture.
- Ensure that leaders and managers know it is their responsibility to develop employees.
- Encourage employees to value lifelong learning.
- Inspire a positive attitude and growth mindset starting at the top.
- Develop and explore learning-to-learn skills.
- Enable organizational and team learning.

These elements are related and difficult to separate. We will explore them all in subsequent chapters, but let's define each here.

Develop a Learning Culture

Striving to create a learning culture is a never-ending challenge. It requires constant attention as well as enough time, clear and aligned communication, and support from

everyone in the organization. ATD Research (2016b) found that three essential characteristics exist in a high-performance organization's learning culture: a sufficient budget to meet learning needs, a dedicated learning function, and senior-level responsibility for organizational learning.

Ensure Leaders and Managers Know It Is Their Responsibility to Develop Employees

This is key to your success. The talent development department's role has changed. We are the catalyst to help our managers develop their people. Helping them understand the value of investing in their employees is the first step. Many managers will need your support to determine how best to approach their role. They will look to you to recommend books, social learning opportunities, online classes, coaching options, and other resources.

Encourage Employees to Value Lifelong Learning

Employees are becoming more accountable for their own professional development. You may call it lifelong learning. Sometimes the term *self-directed learning* is used, or more recently, *personalized learning*. You can create a preset learning journey or pathway or tailor one to meet the organization's or employee's learning needs.

Inspire a Positive Attitude and Growth Mindset

Mindsets and attitudes can affect learning—not just for our personal learning but also how we influence others' learning. Carol Dweck's growth mindset is just one element of the underlying beliefs we have that may lead to success or disaster. Peter Senge introduced us to the concept of mental models, which can either support or inhibit how we learn.

Develop and Explore Learning-to-Learn Skills

Did you learn how to learn? Probably not. Cognitive science has given us a large amount of information, and neuroscience supports much of what we know. We can use learning to learn, learning agility, interleaving, chunking, and other tools to help us learn better and faster and retain concepts longer.

Enable Organizational and Team Learning

Ensuring that information and knowledge flow throughout an organization requires dedication and hard work. Leaders need to take on this role of creating a knowledge sharing process. Developing organizational knowledge and integrating it into the work employees do every day is a powerful tool that affects strategy, encourages teamwork, and inspires innovation.

Each of these learning culture blocks fit together to form the solid foundation you need to build upon as you plan your talent development program. This book will provide tips to help you solidify the foundation blocks in your organization and facilitate the start of a talent development effort for your organization. But first, the rest of this chapter will focus on the first element: creating a learning culture.

Creating a Learning Culture in Your Organization

The concept of creating culture isn't new. Edgar Schein's *Organizational Culture and Leadership* introduced us to the importance of culture in 1985. Now in its fifth edition, that book is considered one of the most influential management books ever published. Schein believes, "The only thing of real importance that leaders do is to create and manage culture. If you do not manage culture, it manages you, and you may not even be aware of the extent to which this is happening."

According to economist Boris Groysberg and his colleagues (2018), culture "shapes attitudes and behaviors in wide-ranging and durable ways. Cultural norms define what is encouraged, discouraged, accepted, or rejected." They go on to say, "When properly aligned with personal values, drives, and needs, culture can unleash tremendous amounts of energy toward a shared purpose and foster an organization's capacity to thrive."

The concept of trying to make an organization better through learning and generating a learning organization isn't new. Remember some of these statements from the past? Jack Welch's, "If it isn't broken, break it." Or Michael Hammer's, "Continuous intervention."



COURAGEOUSLY CANDID

James Chisholm, co-founder and principal of ExperiencePoint, a 50-person company in Toronto, shares his process for nurturing and maturing his organization's culture. Here he discusses the importance of values and having his employees be part of adding new values. Values are the soul of a learning organization, and ExperiencePoint is a model of corroborating this connection.

At ExperiencePoint, our mission is to help organizations become more adept at moving quickly in new directions to create a durable, competitive advantage. Using a hands-on experiential approach, we improve people's ability to create innovation and realize change.

Nurturing and sustaining a healthy, vibrant culture is a top priority for our leadership team, and we've developed bottom-up, organic ways to encourage our culture to flourish. It starts on the first day of the job, when new team members learn that "no single person owns the culture here, but rather it's a responsibility we all share."

It's important to recognize that culture is constantly in flux and not to be controlled. Rather than seeking to control, preserve, and protect our culture, we've drawn inspiration from a gardening metaphor. In evaluating new hires, for example, we look at how a new candidate might "add" to the garden just as much as how they might "fit" with what already exists. When we see an undesirable behaviour, we've found that it is important to address it by pruning quickly. A healthy culture requires constant gardening by everyone.

Our values form the roots of our culture. We have five core values and highlight three key behaviours for each:

- We learn by doing:
 - Experiment to explore and understand.
 - Make mistakes and fail better.
 - Have the humility to listen, ask for help, and try again.
- We serve our clients and one another with authenticity and excellence:
 - Give more than we take.
 - Under promise and over deliver.
 - Follow up fast.

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ABOUT THE AUTHOR



Elaine Biech, president of ebb associates inc, a strategic implementation, leadership development, and experiential learning consulting firm, has been in the field for more than 30 years helping organizations work through large-scale change. She has presented at dozens of national and international conferences and has been featured in publications such as the *Wall Street Journal, Harvard Management Update, Investor's Business Daily*, and *Fortune*. She is the author and editor of more than 80 books, receiving national awards for several.

Among her extensive body of published work are many ATD titles, including the flagship publication ASTD Handbook: The Definitive Reference for Training & Development (2014). Other ATD titles include Starting a Talent Development Program (2018), The Art and Science of Training (2017), Change Management Training (2016), New Supervisor Training (2015), The Book of Road-Tested Activities (co-published with Pfeiffer, 2011), ASTD Leadership Handbook (2010), ASTD's Ultimate Train the Trainer (2009), 10 Steps to Successful Training (2009), ASTD Handbook for Workplace Learning Professionals (2008), and Thriving Through Change: A Leader's Practical Guide to Change Mastery (2007).

Elaine specializes in helping leaders maximize their effectiveness. Customizing all of her work for individual clients, she conducts strategic planning sessions and implements corporate-wide systems, such as quality improvement, change management, reengineering of business processes, and mentoring programs. Elaine is a consummate training professional, facilitating training on a wide range of workplace and business

topics. She is particularly adept at turning dysfunctional teams into productive ones. As a management consultant, trainer, and designer, she provides services globally to public- and private-sector organizations to prepare them for current and future challenges.

A long-time volunteer for ATD, she has served on the association's National Board of Directors, and was the recipient of the 1992 ASTD Torch Award, the 2004 ASTD Volunteer Staff Partnership Award, and the 2006 Gordon Bliss Memorial Award. In 2012, she was the inaugural CPLP Fellow Program Honoree from the ASTD Certification Institute. Elaine was instrumental in compiling and revising the CPLP study guides. She wrote the first ATD Training Certificate Program and has designed five additional certificate programs. She was the 1995 Wisconsin Women Entrepreneur's Mentor Award recipient and has served on the Independent Consultants Association's Advisory Committee. She is currently on the Association for Learning Providers Board of Directors. Elaine is also a member of the Center for Creative Leadership's (CCL's) Board of Governors and is the chair for CCL's Research, Evaluation, and Societal Advancement Committee. She is also a member of CCL's Executive Committee and the editorial board.