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From Firsts to Lasts

There's a first time for everything.

For many of us, living through the time of COVID-19 feels like a never-ending procession of unwelcome firsts.

For just about all of us, this is the first time we've ever experienced a pandemic. There are a few centenarians among us who may have been alive during the Spanish Flu pandemic of 1918 but it's unlikely they recall much of that time.

It's the first time we've been told to stay at home. Used to socializing, dining out and traveling where and when we please, we now fill our nights watching "Tiger King" on Netflix and discovering our heretofore undiscovered talent for homemade baking.

For many office drones used to trudging into the office, it's the first time we've worked from home in a sustained way. That is, if we're fortunate enough to have held onto our jobs. Many of us are now experiencing joblessness for the first time, as well. COVID-19 saw to that, too.

> SOME OF THESE FIRSTS WILL PASS. OTHER FIRSTS WILL LAST.

At school, teachers en masse turned for the first time to online instruction as their primary instructional tool. Homebound students have to jockey for computer time with stressed-out parents doing double and triple duty.

For the first time, bus drivers, grocery store workers and delivery drivers found themselves classified as essential workers alongside firefighters, police and EMTs.

At *Chief Learning Officer*, we found ourselves conducting our biggest event of the year, the Spring CLO Symposium, in a series of virtual rooms rather than at a sunlit resort locale. Our editorial staff assembled this issue of the magazine remotely for the first time in its 17-year history and our art director had to get creative since we couldn't send a photographer to shoot the winner of this year's LearningElite recognition for the cover.

After years of small steps and halting progress, all of us have begun a grand experiment in a new way of working. Armies of workers — those able to do their job from home — traded their 30-minute morning drive for a 30-second stroll from bedroom to spare room. Daily face-to-face meetings and coffee chats have been replaced by Zoom calls and Google Meets.

The global pandemic forced businesses large and small to adjust to a new and painful reality, kicking off this season of firsts. Some of these firsts will pass. With time, the economy will heal and jobs will return. Other firsts will last. Learning organizations that fail to rise to the moment may just find themselves left behind.

Some of the effects of these strange times are easy to see. Budgets tightened up and investments were frozen. Programs deemed nonessential went on ice. High-touch learning experiences like onboarding and leadership development went virtual. We don't know — and won't for quite some time — what it means for the future.

What we do know is the people who make up the community of learning leaders are resourceful, resilient and resolute. Since the pandemic shut office doors across the world, learning leaders have found new and original ways to connect with one another. Cut off from face-to-face meetings and their old ways of connecting, they've found new paths to share ideas and practices.

It's been inspiring to see the many ways learning and development has adjusted to the new reality. Last month, I hosted a webcast featuring Michael Molinaro, chief learning officer of New York Life, who talked about how his venerable institution quickly crafted modern learning pathways to support managers as they shifted to leading remote teams.

Judy Whitcomb, head of learning and HR at Vi (and perennial top-5 finisher in the CLO LearningElite), shared how her team laser-focused on delivering essential services needed to support the health and wellness of the senior citizens living at Vi's retirement communities across the U.S.

Industry leader Elliott Masie assembled a working group of learning leaders to share practices and create a support network for learning professionals who suddenly found themselves out of work. Vendors and service providers raced to open up their services to the community, providing free access to platforms and education aimed at helping the industry navigate unprecedented times.

Examples like these show it's possible to create some good that lasts during and beyond a season of unpleasant and unanticipated firsts. CLO

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If you missed a session or just want to see something from CLO Symposium Spring 2020 again, our video library will be available shortly after the event.

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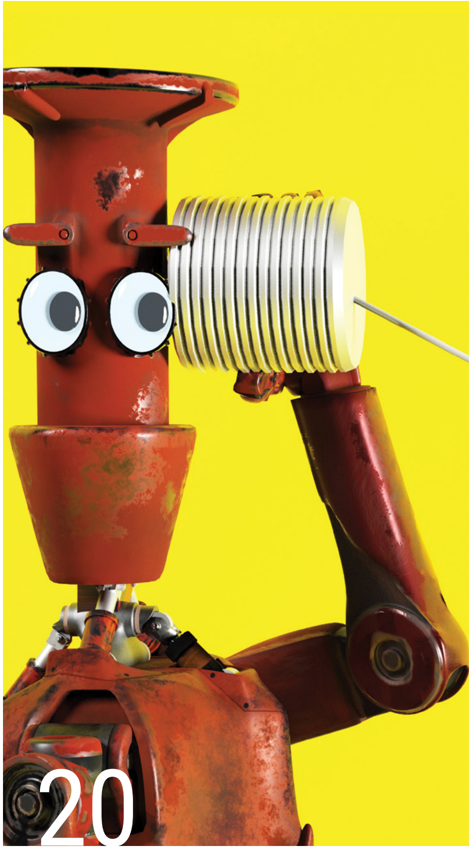

2020 LearningElite

Features

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Career Advice From

Molly Nagler

CHIEF LEARNING OFFICER, PEPSICO

Molly Nagler, chief learning officer for PepsiCo, shares her career journey.

What attracted you to learning and development?

I started my career in higher education, first at UC Berkeley Haas School of Business, then Yale School of Management, because I believe that higher education is the gateway to prosperity. I loved being at the intersection of teaching, research and business.

How did you get your start at PepsiCo?

Working in university executive education was incredibly rewarding, but I didn't get to see the impact of learning over time because our participants would come for a few days and then leave. When PepsiCo gave me the chance to become chief learning officer in February 2019, I jumped at it.

How have you seen technology shape workforce L&D?

Technology is embedded in nearly everything people do, so learners expect their employer to use technology to help them learn. Learning in the flow of work is a big use case: I'm on my laptop or my mobile, and I need some quick instruction, so I log on to my learner experience platform for a 3-minute video or article.

From your leadership experience in your previous roles, and now as a learning leader at PepsiCo, in your opinion, what's an important trait every leader should possess?

Let's talk about the turbulent times we're facing now. Everyone is looking to leaders for three things: decisiveness, calm, and regular, reassuring communication. Never underestimate the value of staying in touch with your team and your customers, even when you don't have anything more to communicate than a simple update and a "How are you?"

What is your favorite piece of career advice?

Carve out an area of incompetence. Professor Jennifer Aaker gave this advice at a women's leadership program

UC Berkeley Haas School of Business
2005–2011: director of academic planning

UC Berkeley Center for Executive Education
2011–2014: director of strategic alliances

Yale School of Management
2014–2015: deputy director

Yale School of Management
2015–2019: senior associate dean for executive education

PepsiCo
2019–present: chief learning officer

2005 · 2011 · 2014 · 2015 · 2019 · 2020

at UC Berkeley. If you're perceived as being good at a lot of things, people will constantly ask you to do those things, even when they're not your job. In other words, set boundaries.

Everyone has a different journey to CLO. What were some key formative experiences you had that allowed you to accelerate to where you are now?

My first job was as a copy editor, where I learned the importance of good writing and attention to detail. I still use these skills today. Then I got a graduate degree in public policy. Seems like a random choice for someone with my career interests, but the analytical skills I learned were priceless. I became much better at critical thinking, and I learned how to communicate with people who value an analytical approach to problems.

When I moved to higher ed, I learned the importance of using research-validated initiatives at work. Academics (and I'm not one, but I have spent a lot of time with them!) have a saying: Is the outcome *because of* or *in spite of* what you did? Example: Are employees performing better this year because your company does annual performance reviews, or in spite of this practice? Did PepsiCo sell more Lay's because of the new bag design, or in spite of it? These questions are very hard to answer, but they are important to ask. As CLO, I endeavor to use research-backed methods in our learning solutions, and I also want to teach associates to critically examine their own initiatives.

Were there any particular mentors or supportive figures who were helpful along the way?

Several hiring managers gave me a shot at jobs even though I didn't have the perfect qualifications yet. I have benefited from managers who hired based on potential rather than experience.

Looking ahead: What's in store for L&D at PepsiCo?

So much! We are moving many of our in-person programs online and creating rich virtual experiences. We have new leadership programs, a new learner experience platform, more learning in the flow of work, more leaders as teachers and more investment in our learning culture. What's not changing is our commitment to being a partner to and an enabler of the core business. CLO

Know someone with an interesting career journey? We want to hear from you. Send your nomination to Elizabeth Loutfi at eloutfi@ChiefLearningOfficer.com.

SMALL BITES

Molly Nagler answers our rapid-fire questions.

The most important part of learning is:

What you do with it.

The most overrated trend in L&D is:

Activity metrics as proxies for impact.

Learning is essential to an organization because:

It ensures you will thrive no matter what the future brings.

The biggest L&D industry misconception is:

The only solution to a business problem is expensive, customized content!

The most underrated trend in L&D is:

Podcasts. We're seeing a huge uptick in demand for these easily consumable learning resources during COVID-19.

This year, I am most proud of my learning organization for:

Adapting quickly to changing learning needs — in format, skill, topic — during COVID-19.

The best way to support learners is by:

Making learning both easy and hard. Easy to access, but challenging to learners' normal habits of thinking and working.

What Are You Reading?

Under Our Skin: Getting Real About Race

By Benjamin Watson

It is a powerful look at the realities of race and diversity. It is especially valuable because the author offers both sides of the stories and examples he shares, helping every reader find a way to connect emotionally with the concepts. For learning and business leaders looking for ways to be more equitable and inclusive, this is a great resource to think more critically and openly about decisions we make about how to engage our people. Understanding where others come from helps us respect and appreciate their different perspectives. Research shows that diverse organizations perform better, so these insights are critical for business performance today.

— Ben Eubanks, principal analyst, Lighthouse Research & Advisory

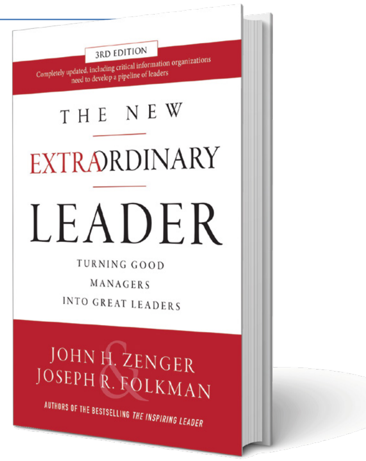
Building the Intentional University: Minerva and the Future of Higher Education

By Stephen Kosslyn and Ben Nelson

Ben Nelson and Stephen Kosslyn have created a university designed with one goal: equipping students with the cognitive tools they need to succeed in the world after graduation. For those of us who dream of an improved formal education system that is affordable for all, effective and practical — this book is for you. "Building the Intentional University" is a blueprint we should follow for the future of higher education. More important — the authors have executed on the blueprint, brought it to life and created a successful university, Minerva, that stands to revolutionize and modernize the higher education system to meet the needs of the learner. This is an important book for everyone, not just those in formal higher education. As a learning and development practitioner, the insights into their blueprint and university can translate from the higher education world into corporate education and adult learning theory. Thinking critically, thinking creatively, communicating effectively and interacting effectively — the four core competencies of Minerva University — are critically important skills for all students and employees to master. These are the skills needed to empower, enable and encourage our workforce to be successful today and in the future of work.

— Keith Keating, senior director of global learning strategies, GP Strategies Corp.

Chief Learning Officer wants to hear from you: What's at the top of your reading list? Send submissions to Elizabeth Loutfi at eloutfi@ChiefLearningOfficer.com.



The New Extraordinary Leader: Turning Good Managers into Great Leaders

By John H. Zenger and Joseph R. Folkman

The latest thinking and research from two preeminent talent development professionals. So much of what's out there in the field of leadership development amounts to fads or opinion, where this book is a terrific balance of solid research on the evidence of leadership as well as a pragmatic set of strategies that are proven to work. The new chapters on women in leadership, measuring improvement and team-based leadership training are particularly noteworthy.

— Kevin D. Wilde, executive leadership fellow, University of Minnesota Carlson School of Business

Top of Mind

Learning: Your Secret Weapon to Increase Engagement *By Bea Bourne*

Bea Bourne, professor at Purdue University Global, illustrates how engagement looks across different generations.

Workplaces with highly engaged employees have a significant competitive advantage. Engaged employees are more productive, remain with the organization longer, experience more positive emotions and have less absenteeism. Overall, engaged employees contribute to better customer service, quality, profits and productivity.

Although employee engagement is highly desired, only about a third of employees are engaged in their workplace, according to a 2015 Gallup study. About half of U.S. employees are not engaged, and even worse, 17 percent are actively disengaged. Engagement Institute researchers in 2017 estimated the cost of employee disengagement to be as much as $550 billion a year.

Engaged employees tend to have a passion for their work, go the extra mile and feel connected to the organization. **Not engaged** employees tend to be neutral, do just enough work to get by, and have little concern for the organization, customers or profits. **Disengaged** employees tend to be unhappy at work, demonstrate their unhappiness and may undermine the efforts of others who are engaged.

Many practices contribute to employee engagement; among these are learning and development. L&D professionals must understand and determine ways to best develop and train a multigenerational workforce whose members have different values, learning styles, preferences for training and expectations.

The five generations in the workplace present an L&D challenge. Generational cohorts have different life experiences that contribute to their world view, how they interact and their levels of engagement in the workplace. Although organizations recognize changing demographics represent a significant organizational impact, most do not know how to adjust.

Millennials, the largest generation in the workforce, are characterized as having low levels of engagement. According to 2017 Gallup research, inadequate or a lack of professional and career development may be among the reasons for low employee engagement among millennials (29 percent). Furthermore, millennials are more likely than both Gen Xers and baby boomers to say a job that accelerates their professional or career development is very important to them.

Millennials are more engaged in an environment where they are evaluated continuously and provided ongoing feedback. Baby boomers do not share this need. In a learning environment, learners' input must be valued, and individual feedback should be solicited. Likewise, learners need feedback and a review of main points to increase awareness of what was learned and reinforce application of learning.

Bea Bourne
Purdue University Global

All employees must have the hard and soft skills and training required to perform their job. With an increasing number of employees working virtually, especially now, managers need training on how to keep virtual employees engaged. Appropriate training methods are necessary to engage employees with different learning styles and needs. The method of training delivery, the learning environment, technology, amount of reading, training materials and feedback should all be factored.

Onboarding processes should communicate how the job contributes to the overall organization. Onboarding can provide an opportunity to make a positive first impression that could initially connect new hires to the organization and build a foundation for engagement. Employee loyalty is a relic of the past, especially among younger generations. In an environment with a skill shortage, skilled employees have many choices.

There will be an increased need for training and leadership development for the next generation of leaders as 10,000 baby boomers reach retirement age each day. According to 2017 *Training Magazine* research, high-performing organizations are more likely to tailor learning methods to the new generation of leaders, help new leaders manage the transition to leadership positions and make next-generation leaders a priority for the organization. CLO

Chief Learning Officer wants to hear from you: What are you thinking about? Send your thoughts to Elizabeth Loutfi at eloutfi@ChiefLearningOfficer.com.

According to Bea

WHAT ARE YOU MOST LOOKING FORWARD TO THIS YEAR?

The L&D trend I am most looking forward to is an increase in soft skills training to help close the gap in soft skills that exists across industries.

Smart Watches for … Learning?

Beyond the e-health and fitness phenomena • BY ELLIOTT MASIE

Elliott Masie is CEO of The Masie Center, an international think tank focused on learning and workplace productivity, and chairman and CLO of The Masie Center's Learning Consortium.

Look at the wrists of your workplace colleagues, friends and neighbors. Check out how many of them are wearing a digital, smart, electronic watch.

I completed this exercise in an Amtrak car while riding to Saratoga Springs, New York (pre-COVID-19). There were 38 people in the car, and I saw about 20 digital watches.

The rise in digital watches has been driven by the e-health and e-fitness phenomena. Many smart watches have motion sensors, blood pressure monitors and even physical stress data capture. While at the Consumer Electronics Show in Las Vegas earlier this year, we saw loads of new sensors and monitors that can be added to digital watches to provide real-time data about mindfulness, total talking time and other bio indicators.

Smart watches are moving beyond e-health to integrate workflow performance, group collaboration and behavioral coaching. Data from your enterprise systems or manufacturing machinery could be displayed on a smart watch for alerts and safety. Our watches could indicate which people in the workplace have the knowledge we need to answer a question, including if they are close to our location or available for a digital coaching moment.

Smart watches will be woven into digital and voice-based ecosystems, including Apple's Siri, Amazon's Alexa and Google's Home. The speaker and microphone (and someday an optional camera) in the smart watch will allow us to ask a question and get a rapid, personalized response that comes to the watch or maybe to an earpiece or audio-enhanced glasses or goggles.

I predict the future of the smart watch as a powerful and personal device that can optimize learning, collaboration, performance support and "me data," providing data dashboards for employees throughout the workday.

Let's imagine some of the functions, features and technologies that could facilitate different and expanding experiences to enhance learning and readiness.

System and workflow changes: The smart watch could indicate that a piece of machinery, a product in a retail store, a technology in a hospital or a screen on a system is new or updated.

Mental readiness to learn: Learning requires a physical and cognitive readiness to engage and personalize new content. Imagine bio indicators that could measure your readiness to learn. I would not start an online module if I was tired or my stress level was peaking. A feedback indicator could advise learners about learning "right now."

Knowledge right next to you: Suppose an employee is planning a trip to Atlanta to work with a new customer: Coca-Cola. At lunch, their watch indicates that a fellow worker used to work at Coca-Cola (by searching LinkedIn). They might seize the moment to get a context story about Coca-Cola culture from this colleague.

> SMART WATCH LEARNING ASSETS WILL COME FROM THE ENTERPRISE AND EMPLOYEES.

My behavioral patterns — digital coaching: Imagine two employees in leadership programs working on improving their interactions with colleagues. One wants to lower their tendency to interrupt colleagues mid-sentence. The other wants to increase the number of questions they ask their team members. The smart watch could provide real-time or end-of-day feedback to each of these employees about observed shifts in their behaviors.

Real-time nudges for a keynote speaker: I would love to be the first user for a smart watch app called "Better Speeches." It would have a range of quiet vibrations that could prompt me on timing. It would listen for key phrases that I had programmed, perhaps to switch a visual display or play a media segment. And it might someday be networked with the audience's watches to provide real-time curiosity or boredom notes.

Experiences vs. courses: As we explore the role of experiences — ranging from stretch assignments to field road trips to simulations — we will want to design and facilitate actions and interactions in the workplace that are *experiences* — with "aha" and even a few failure moments. Smart watches can be used as guides for these experiences.

Smart watch learning assets will come from both the enterprise and from employees as consumers, who may use meditation or health apps as personal tools. And our learning and workflow systems will build apps that are smart watch-ready. Let's explore "learning watches" and apps, being sensitive to both privacy and data accuracy realities. CLO

High-Involvement Change Leadership

Building commitment to change • BY KEN BLANCHARD

It's an understatement to say that organizational change creates stress for everyone involved — we've all heard the dismal statistic about how 70 percent of change initiatives fail. So how do you take the reality of change and make it more likely to be successful — *and* bearable?

It helps to think about it from the perspective of people who work in your organization. Having a high-involvement leadership strategy is the best way to build people's commitment to change.

Many change efforts derail when top executives believe announcing the change is the same as implementing it. People hearing such an announcement can immediately feel resistance — not so much to the change itself but to the feeling of being controlled. They need their concerns and questions to be addressed.

We have found that when learning about an organizational change, people usually experience five predictable, sequential stages of concern.

Stage 1: information concerns. First, people want to understand exactly what is being proposed. They don't want to be *sold* on the upcoming change; they want to be *told* about it. Common questions include, "What is the change? What do we hope to accomplish? Why do we need to do this now? What's wrong with the way things are?"

People need to know what the change is about, why it's important, what success looks like and whether it will be worth the effort. Allow them to voice their concerns and have their questions answered. Why? Because in the absence of factual communication, people often create their own reality — and speculation becomes fact.

Stage 2: personal concerns. Once they have been given basic information about the change, people tend to turn inward and think about personal concerns. They may be focused on what they will lose, not what they will gain. They may be thinking, "How will I be affected by this change? Will I benefit from it? Will I be able to learn what I need to know?"

People with personal concerns need to be assured they will have a voice in planning and decision-making. Listen to their personal concerns in a way that lets them know they have been heard. Help them feel inspired and excited about the future and their role in the change.

Stage 3: implementation concerns. At this stage, people begin to think about the process of implementing the change. They are wondering, "How are we going to do this? Is the plan realistic? How important is this change compared with other priorities? How will we measure success?"

People with implementation concerns are focused on details. They need to know that challenges and obstacles will be addressed and that they will have the time, support and resources they need to do their part. Help them develop confidence in the organization's ability — and their own — to successfully implement the change.

Stage 4: impact concerns. When the change goes live and anxiety has somewhat calmed, impact concerns arise. Folks want to know, "Is the change working for the organization? For my team? For me? Is the effort worth it? How do we get undecided people on board?"

People with impact concerns need to see proof that the change is reducing the gap between what is and what could be. They also need to hear and learn from colleagues who are already having success with the change. At this stage, people sell themselves on the value of the change and can be a positive influence on those who are still undecided.

Stage 5: refinement concerns. After most people are on board and experiencing success with the change, fine-tuning gets underway. People begin to ask, "How can we do this better or faster? What have we learned? Do you trust us to lead this change going forward?"

> IN THE ABSENCE OF FACTUAL COMMUNICATION, PEOPLE OFTEN CREATE THEIR OWN REALITY.

People with refinement concerns want to be entrusted with the process. They need to believe their involvement in continuous improvement of the change is valued and that they can be counted on to manage the change in the future. In fact, people at this stage are often already formulating the next change.

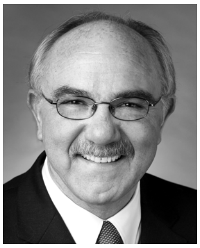
The more you include people in looking at options and alternative ideas, the easier it will be to build the business case for the next round of change. Resolving concerns as change evolves builds trust, surfaces challenges, gives people opportunities to influence the process and allows them to refocus energies on the change.

When leading through change, what you are changing is important — but involving people in the change can be the difference between failure and success. CLO

Ken Blanchard is chief spiritual officer of The Ken Blanchard Cos. and co-author of "Collaboration Begins with You: Be a Silo Buster."

ROI on a Shoestring

7 ways to minimize resources and still show value • BY JACK J. PHILLIPS AND PATTI P. PHILLIPS



Jack J. Phillips is the chairman and Patti P. Phillips is president and CEO of the ROI Institute.

We know the situation you are facing with the COVID-19 crisis. Budgets have been cut or are under scrutiny. The talent development team is challenged with showing the value of key programs, particularly the important, expensive programs involving a lot of people. At the same time, you don't necessarily have the resources to devote to a comprehensive evaluation. So, what can you do?

Here are 7 ways to minimize resources and still show the value of a major program at the impact and ROI levels.

No. 1: Share the joy. It's important for every member of the team to share the responsibilities for designing, developing and delivering impact and ROI. Everyone has a role in making the program work. For example, the needs assessment team should start with *why*, with a clear business measure at the beginning, ensure that the proper solution is implemented and develop objectives at multiple levels, up to and including impact. Then the design and development team must develop the program to deliver value at every level, from reaction to learning to application and impact. The facilitators' role is to teach to business impact. Managers of the participants must support the learning and encourage success at the impact level. With this approach, the entire team has a role to make the program successful.

THIS IS THE TIME TO SHAMELESSLY BORROW FROM OTHERS.

No. 2: Build in data collection and analysis. When designing for success, the developers must create tools to capture the data and even shift some of the responsibility for analysis to different groups, including the participants. For example, an action plan can shift the application and impact data collection and analysis to the participants, who provide details of action steps followed and the impact achieved, sort out the effects of the program and even convert data to money. If a program starts with the impact measure in mind in the beginning, the action plan is a way to improve the selected impact measure. There is a good chance that the participant will want to improve that measure. Buy-in has improved.

No. 3: Use shortcuts. You may not have time for the most comprehensive analyses, and perhaps, shortcuts will do. For example, a guiding principle in the ROI Methodology states, "When planning a higher-level evaluation, the previous level of evaluation is not required to be comprehensive." This means that if you have a credible analysis at the impact level, then maybe shortcuts with self-assessment instruments for application and learning would be sufficient.

No. 4: Use estimates. Sometimes estimates are appropriate to use, particularly if other methods are not available. If you don't have the time to conduct an experimental versus control group, mathematical modeling or trendline analysis, estimates can be used to sort out the effects of the program on the data. Also, estimates can be used to arrive at the monetary value of a particular data item for the ROI analysis. Estimates are appropriate if they are taken from the most credible individuals, collected in a nonthreatening and unbiased way, and adjusted for the error, another guiding principle of the ROI Methodology.

No. 5: Use simple statistics. There are times when hypothesis testing, factor analysis or multiple variable regression analysis might be helpful for some types of analysis. But the key is to keep it as simple as possible and use only what is necessary. The audience for this level of evaluation is the sponsor or executives who are funding this program. They have a desire to keep it simple. Sometimes simple averages and ratios will do.

No. 6: Use available tools and templates. This is the time to shamelessly borrow from others. ROI Institute will share information with you and provide tools and templates to any individual who needs help, even if they have not participated in ROI Certification.

No. 7: Be selective when evaluating to this level. Keep the number of programs evaluated at impact and ROI levels to a precious few. This level of evaluation is for programs that are very expensive, high profile, important to the success of the organization or tied to strategy. These are usually major soft skills programs that attract management attention and consume much of the L&D budget. Keep it sensible and try not to tackle too much.

These seven simple techniques to follow in these difficult times will allow you to show the impact of key programs. This will help leaders make critical decisions about allocating resources and make sure talent development obtains its proper allocation. CLO

Know How Your Firm Makes Money

Understanding the business strategy and corresponding drivers • BY DAVID DeFILIPPO

David DeFilippo is principal of DeFilippo Leadership Inc. and an executive coach at Harvard Business School.

I'll never forget when, back in 2007, I had a meet and greet with the CFO of my then firm as part of my first three months on the job while I was conducting my current state assessment. One question I asked sowed the seeds for a long-standing working relationship.

We had finished the formalities of our career and personal backgrounds and started to move into the business phase of our discussion. He started by offering examples of the professional development needs of his team, and after listening I redirected the conversation by asking, "Can we come back to that, and can I ask you a different question? How does this firm make money, and can you explain the business drivers to me?"

The curious look on his face made an everlasting impression on me. He said, "Nobody from HR has ever asked me about the business. Why do you want to know?" I explained that I needed to learn the business to establish credibility with stakeholders, understand the connection between the business strategy and its human capital capabilities, and role-model being a lifelong learner.

The shift in that first meeting (and many more that followed) is significant for several reasons.

First, understanding the business strategy and corresponding drivers is fundamental to establishing a talent and learning structure and plan. For example, as the CFO explained the historical revenue sources, margin ratios and competitive strengths and compared those with the future business goals, his tutorial led me to ask more questions which, in turn, expanded this initial meeting to more of a mentoring relationship. Through these regular dialogues, I was building a strong base of knowledge about the business as I continued my current state assessment, which became critical to clearly articulating the future direction for our learning and development plans.

The secondary benefit of this exercise was that the CFO had a recognition that more of our senior-level new hires would also benefit from this type of business literacy education. As a result, he became a staunch advocate for the leader-as-teacher approach that we embedded into our leadership development strategy.

Next, with this new knowledge I was better positioned during my needs assessment intake meetings to speak with other senior leaders and longtime company experts. As they saw me learning and asking questions, they were more willing to spend time with me as I connected the dots to what would ultimately become the plan that defined our future talent direction. As I made the connections between the organization's stated goals and uncovered the causal links to the gaps, that data formed the basis of a human capital plan that I could translate into the language of that industry and business, thereby making it credible to stakeholders. Further, as my industry knowledge grew I found myself explaining the business model externally, which was a telltale sign that I was now fluent in this new language.

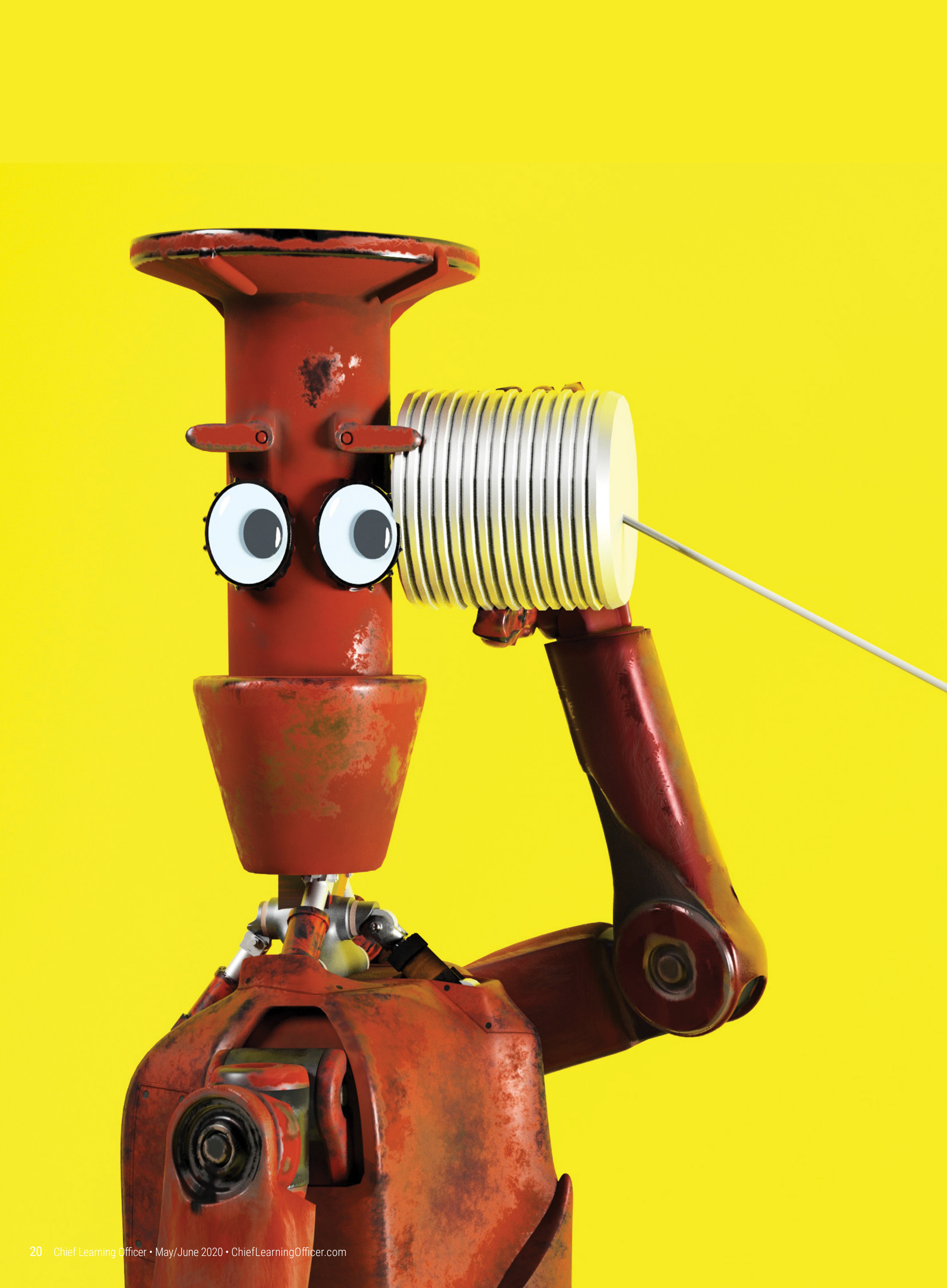
> BUSINESS LITERACY PROFICIENCY IS A MUSCLE THAT CAN BE BUILT OVER TIME.

The third reason that practice became relevant was with external audiences. We all know that the best way to retain knowledge is to teach, so when I was invited to speak at HR industry events I was able to practice. For example, whenever giving a speech or leading a discussion with my learning and talent brethren, I rooted that conversation in the business goals, challenges and solutions before discussing anything about human capital.

The point is that this fluency takes time to build and is valuable for practitioners. It is a muscle that can be built over time and serves as an expression of lifelong learning.

At that time, I was the chief learning officer and Steven Lipiner was the CFO for BNY Mellon Asset Management, a top 10 global asset manager. Lipiner recalls, "Having your HR leadership well-versed in the financial and strategic drivers of the business and industry overall is a differentiator. The value is not just making the HR professional a stronger strategic partner to senior management and less process-driven, but also making finance leadership more well-rounded as it relates to talent implications, which does not naturally enter into their day-to-day equations. The upside of a solid HR and finance relationship is often underestimated and when it's strong has mutual benefits to both departments and the wider organization."

As I reflect back on that initial meeting all those years ago, I am grateful for how much I learned from my friend, Lipiner, and know this was a reciprocal relationship because he now regularly asks me about leadership development, coaching approaches and the like. CLO



Text Buddies:

L&D Use Cases for Chatbots

Chatbots need to be clear about what they have to offer, when they'll deliver it and, above all, why learners should opt in.

BY TIFFANY VOJNOVSKI

Imagine you've just made two new friends at a learning conference. Both are smart, well-connected people with a wealth of experience — and they share many of your professional interests. You trade numbers, pledging to continue the conversation.

In the next few weeks, Friend A reaches out a handful of times with an insightful article on one of your shared interests, encouragement on a project you are struggling with and a link to a webinar that addresses a challenge you mentioned. Sometimes it takes you a few days to respond to one another, but when you do text, you trade information, support and advice.

Friend B is another story. They also share, and often, but the links, articles, videos and stories are of varying quality. Not only do some barely pertain to your interests, they arrive at the worst times, such as when you're winding down for the evening or sitting down to a family dinner. Before long, you're frustrated and annoyed by the barrage — and quietly block Friend B's number.

When you're investing your valuable time — and data — into a text conversation, it's important to be aligned from the start on norms of when, how and what to communicate. Similar rules apply to text or SMS chatbots: They need to be clear about what they have to offer, when they'll deliver it and, above all, why learners should opt in.

So how can we get our learning chatbots on the A list?

1. Choose the Proper Use Case.

Chatbots can be seen as shiny objects, but a well-executed chatbot delivers more substance than sheen. However, before you invest, consider the business problem you want to solve and ask yourself, "What's the simplest learning solution?" If you need to push out a few updates, the best solution might be a simple, old-fashioned memo. But if you're looking to sustain training gains or reach a far-flung group of learners, you might have a use case.

Live training gets high marks, but the cost can be prohibitive, and the retention drop-off, or forgetting curve, is dramatic. Check-ins from a chatbot can provide learners with the spaced repetition they need to maintain — and, ultimately, apply — the new content. General Motors Accessories Dealer Installer Manager John Stiller witnessed these benefits firsthand when he partnered with GP Strategies to build a chatbot sustainment tool to support live sales training. "The longer we keep key concepts in our daily conversations, the more likely it is that people will retain and use what we're trying to teach them," Stiller observed. Learners who opted into the chatbot experience had an easier time recalling competitive advantages of the new vehicle — and shared those with their customers.

Reaching a dispersed group of learners is another application for a chatbot. Whether learners are scattered across regions and time zones, like Stiller's sales team, or across departments and worksites, a chatbot can create a unifying experience. Leslie Allen, instructional design manager at GP Strategies, used a chatbot to put a friendlier face on the onboarding experience for a marine manufacturer. Allen noted that a single cohort contained "back-office and manufacturing floor positions, union jobs and non-union jobs, salaried and hourly," and spanned three shifts at seven worksites. This range of variables made checking in individually with every new hire impossible — but the manufacturer's HR department didn't want its newest employees to feel, pardon the expression, at sea. Allen's team created a chatbot experience that provided vital information about first-day logistics and benefits elections, collected feedback about the onboarding experiences, and shared motivational and humorous content.

It's great to be able to identify a use case, but it's equally important to know when a chatbot isn't a great fit. Longer-term learning experiences might be one such example. When Bonnie Beresford, director of performance and learning analytics at GP Strategies, measured learner engagement with a product-training chatbot, she observed a decrease over time. The chatbot sent a total of 12 chat messages at two different cadences: Track A, with a duration of two weeks, and Track B, with a duration of four weeks. Learner engagement on both tracks maxed out at 10 days. At that point, Track A learners had received 80 percent of the material compared with Track B's 40 percent. Beresford's findings suggest that the best chatbot use cases may be short bursts of learning that maximize that early spike in learner engagement. If you do find that a chatbot is the best — and simplest — way to deliver a longer-term learning experience, you'll need a plan to maintain learner engagement over time. Mapping out a calendar of activities to deliver to learners at strategic moments is a concrete way to do so.

It's also smart to keep a calendar of all learning experiences being implemented among your target audience. Your use case deflates if others are running competing learning experiences using the same modality with the same learner group. Keith Keating, senior director of global learning strategies at GP Strategies, cautioned, "Use [chatbots] strategically, and create a process for planning and implementing chatbot initiatives. Otherwise, you run the risk of overusing the tool and having multiple message threads occurring simultaneously."

If learners are subjected to multiple chatbot threads over SMS or text, they'll become irritated and overwhelmed and opt out of all of them. However, splitting overlapping chatbot experiences into different channels can alleviate learner fatigue. For example, a two-week product-training intensive

Chatbots can be seen as shiny objects,

but a well-executed chatbot delivers more substance than sheen.

delivered via SMS and a month-long sales-skills refresher delivered via Microsoft Teams keep learners from being bombarded in either "channel." Creating a process that encompasses scheduling and modality ensures that you don't overwork your clientele — or waste your investment.

That said, don't be afraid to dream big with your chatbot. My dream is to pilot a chatbot with an indexed catalog of performance support resources to replace the gated, cumbersome LMS of yore. It's a "pull" solution, so learners access it when and if they like. Through a few brief questions, they're routed to the most relevant performance support solutions, all of which are labeled intuitively and offered in multiple modalities. The chatbot-as-LMS offers the advantages of accessibility, indexability and informality. A great conversational user interface helps to make it palatable — even fun — and intuitive to use. If learners aren't using it, the learning team has to adapt and reiterate. Like any product or service, learning solutions should be subject to market forces.

2. Make it Relevant.

Once you've identified your chatbot use case, look for opportunities to incorporate choice. Learners' phones are their personal space — respect that space by minimizing the amount of irrelevant information you send to it. For example, Allen's team honed the onboarding chatbot for a marine manufacturer with a series of questions to branch their diverse group of new hires to relevant learning paths. "Once we know the exact characteristics of each user, we can feed them helpful, targeted information," Allen said. Don't waste that early engagement high asking learners to sift through information that doesn't apply to them.

Personalizing is key — and so is establishing norms of when and how often to text. Whether you've got a complex, branching journey like the marine manufacturer or a weeklong product training sustainment series, the learner should know how many texts they can expect and for how long. If possible, incorporate a status indicator in each text to indicate how far the learner is in the journey. Even fatigued learners may rally if they know they've only got a few more chats to go.

> The quick,
>
> casual tone
>
> of the chatbot experience belies the effort that goes into its development.

Ideally, your chatbot design would offer the learner their choice of preferred days and times for receiving texts. If that level of customization isn't possible, choose the cadence that is least likely to disrupt learners' personal lives — and measure learner satisfaction (see Step 3). For example, the learners in Beresford's study were quite vocal about their preference not to receive texts on Sundays. "Don't text on Sundays" is now a cardinal rule of chatbot design at GP Strategies.

3. Build in Time for Measurement and Iteration.

Chatbots have brief lifespans and are quick to evolve. "Each implementation of a chatbot will be different," Beresford said. "Pilot it and measure it. You'll learn quickly how to make it better." Even a simple measurement plan can help chatbots improve from one generation to the next.

If your team is looking to pilot a chatbot experience, incorporate the following considerations into your measurement plan for meaningful, actionable feedback:

- Initial engagement: opt-in rate.
- Continued engagement: engagement rate.
- Knowledge retention: quiz scores.
- Overall experience: net promoter score.

The quick, casual tone of the chatbot experience belies the effort and hours that go into its development. Even simple measurement plans take time. Branched learning paths add content development hours. Striking the right tone — especially during the first generation — takes numerous drafts. The interface itself can be a constraint: Sharon Kelly, GP Strategies' automotive training writer, noted that developing chatbot content "can be tough given the restrictions on character count."

Even once your team whittles the message down to the allotted space, there may be other issues to troubleshoot. "With so many phones and carriers, it is nearly impossible to guarantee that messages will be carried over; arrive in the desired

CHATBOTS continued on page 53

Finding Solutions to 4 Problems L&D Can Solve

Webcast Summary: Practical Ideas to Overcome Persistent Learning Challenges

By Adina Sapp

In a recently released on-demand webcast titled *Finding Solutions to 4 Problems L&D Can Solve: Engagement, Content, Compliance, and Onboarding,* JD Dillon presents foundational principles and practical ideas to overcome persistent learning challenges that cross all industries.

Dillon is the chief learning architect at Axonify. He is an expert in workplace learning and has a practical approach to solving business problems through modern learning practices.

Referencing Donald H. Taylor's *2020 L&D Global Sentiment Survey*, Dillon postures that the biggest problem in the learning industry is a disconnect between the discussion of what's new in the L&D industry and the day-to-day functions of working in an organizational L&D role.[1] That disconnect causes a fundamental problem of how to advance our practices around the work we do every day.

Dillon's webcast seeks to balance this conversation by acknowledging the forward thinking of such concerns as AI and data, but not forgetting the daily longstanding challenges of engagement, content, compliance, and onboarding.

Fit and Focus

All the problems we face on a day-to-day basis have some commonalities, and a big one is time. People don't have enough time to complete necessary compliance training. Because there's so much information, there's no time to squeeze all the content into an onboarding session when it's limited to a few hours or days. There's also not enough time to update content when it is constantly changing, and when employees are focused on doing their work, there's not enough time for learning.

The solution to the time problem is something Dillon calls *fit and focus*:

- **FIT** the learning to your environment.
- **FOCUS** the content to your learners.

The key here is to identify the persona before you determine the right-fit solution. Then you can connect that persona with the problem the business is trying to solve and identify the correct learning tools to use.

By applying the fit and focus solution to any situation, you can achieve better results in less time. For example, with compliance you can uncover the real compliance requirement specific to the role and build smaller, more focused onboarding content that addresses the real need, along with motivational tactics that match workplace culture. This fit and focus approach results in better value and improves engagement.

Prioritize Achievable, Measurable Solutions

Budget is another contributor to the longstanding challenges of L&D. There never seems to be enough resources to address the challenges of engagement, content, compliance, and onboarding.

The solution here is to prioritize achievable, measurable solutions that you can use to show results. Once you have those demonstratable, measurable results, you can build the business case for more resources to fill the gaps.

Measurement is that other familiar challenge we have as an industry. Figuring out how to measure your results requires some creativity, but more importantly it requires that you do

1 Taylor, D. (2020). *The L&D Global Sentiment Survey 2020 – First Thoughts.*

the work of defining the exact measurable business outcome you're trying to achieve. It's not enough to say that you want to improve customer service, for example. What about customer service are you trying to improve?

By defining the specific results and how you will measure them, you'll find clarity in how to focus your content creation efforts. You'll be able to define the knowledge required to execute the expected behavior and define the observable behavior required to achieve the result.

Conclusion

All the persistent problems of L&D come back to one question: What is the real problem we're trying to solve? We're aiming for something beyond compliance, onboarding, content, and engagement, but we get distracted by the details and gimmicks.

"For every problem you're trying to solve," Dillon advises, "take the time to distill it down."

Links

This webcast *Finding Solutions to 4 Problems L&D Can Solve: Engagement, Content, Compliance, and Onboarding* is available on-demand here: https://event.on24.com/wcc/r/2177716/8D-F0AA6846F610014BA49D0741BBD884. This program counts for 1 (General) recertification credit hour toward PHR, SPHR, and GPHR recertification through the HR Certification Institute. For more information about certification or recertification, please visit the HR Certification Institute website at www.hrci.org.

You can also register to get a demo at Axonify.com or sign up for Axonify's monthly newsletter at axonify.com/take5.

INDUSTRYINSIGHTS

Getting employees ready for the work of tomorrow

What new surveys reveal about the skills preparation gap

By Adina Sapp

How will AI and automation affect industries over the next five years, and what's being done to prepare organizations and workers for the coming change? In a recent on-demand CLO webinar, Jerome L. Rekart, Ph.D., presented his work examining the perceptions of HR leaders regarding this topic. Dr. Rekart is the vice president of research and insight at Southern New Hampshire University (SNHU) and has a background in neuroscience and learning theory. His goal is to ensure imparted knowledge has a practical application.

Dr. Rekart indicated that it is important to understand how organizations are beginning to plan for changes likely to be brought about by AI and automation, particularly as a 2019 Northeastern/Gallup survey has shown that a majority of workers worry that technology will destroy more jobs than it creates. The work conducted by Southern New Hampshire University examined the perspectives of HR leaders from across the United States.

Survey highlights

- **32%** of corporate respondents think there will be no AI or automation impact on their organization, though some think it will have an impact on their industry, and an even slightly larger percentage think it will have an impact on the global economy.
- LEADERS ACROSS ALL SURVEYED INDUSTRIES anticipate an average of 32% of the workforce will be displaced by AI or automation over the next five years.
- ALMOST TWO-THIRDS of organizational leaders indicate they're not making any plans to prepare for the impending AI- and automation-induced employee displacement.

Survey summary

Despite the clear perception that AI and automation will affect all industries and workers in some manner within the next five years, the SNHU survey exposed a disconcerting truth: most companies aren't thinking about how to prepare. "This was incredibly interesting to us as researchers," Dr. Rekart said. "Most (strategic) plans go out five to 10 years, so the fact they chose an overwhelming 'No' was very interesting."

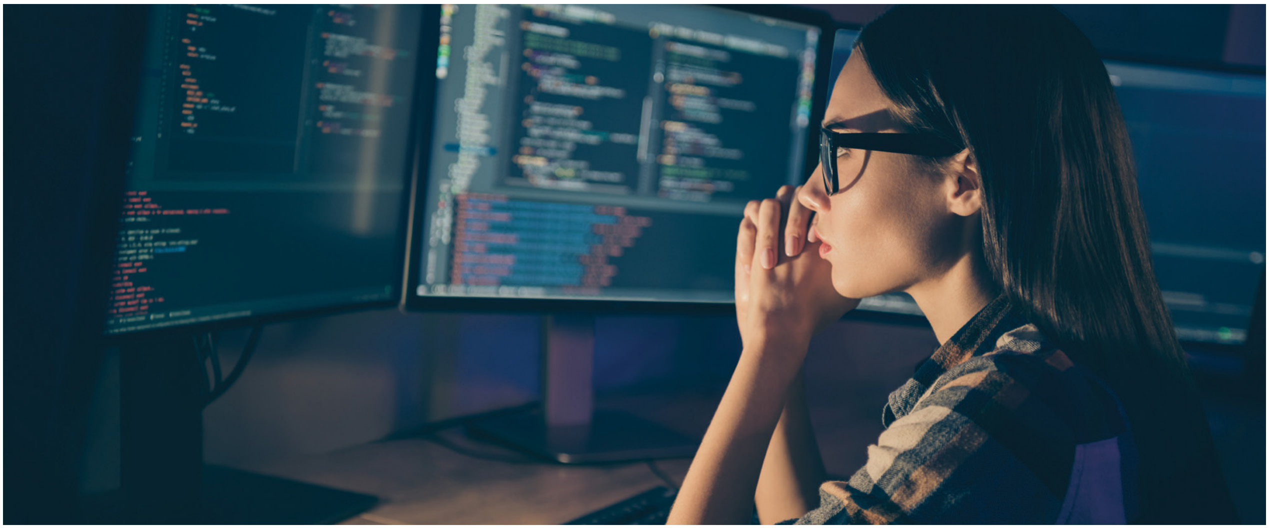
Further analysis found a threshold by industry. "Those leaders who indicated the highest likelihood of displacement were those most likely to say yes, they were planning," Dr. Rekart concluded.

The rosy outlook of respondents seemed somewhat discordant. Even though the respondents on average thought half of their workforce would be displaced and weren't making plans to prepare for that, a majority of organizational leaders thought the changes brought by AI and automation would have a positive impact on their employees.

Prepare against worker displacement with upskilling

Of those leaders who have begun planning for employee displacement by AI or automation, upskilling was found to be the top choice, whether through employer-provided professional development opportunities or by offering tuition reimbursement or opportunities to retool via college coursework.

"We asked respondents what advice they would give an employee whose job is likely to be replaced by technology in the next five years, and the advice was to get new skills or training," Dr. Rekart said. "It isn't just that the technology is coming to replace us, but we could be replaced if we can't keep up with particular technologies. There is a necessity to adapt."



SNHU's research found the general advice from organizational leaders was to upskill now and find a job that technology will never be able to replace. "Begin reading about AI and probable displacement and look into some percentage of current transferable skills into expected high-demand skill areas and skill up now."

"Don't wait," advised one leader. "Begin reading about AI and probable displacement and look into some percentage of current transferable skills into expected high-demand skill areas and skill up now."

"(Try) not to specialize too much. The more flexible you can be, the better," advised another.

There are different ways to upskill yourself and your employees: tuition reimbursement, education, and learning on the job, among others.

"There are unbiased academic studies that show upskilling really does work," Dr. Rekart said. "Science shows that productivity and loyalty to an employer increase through on-the-job training. Lumina did a great study a few years ago that shows a clear return on investment for every dollar invested in training employees."[1]

"At SNHU, we're developing learning products that are practical, targeting skills that transcend just one job, and making use of the reality that you can learn while on the job. Adults in the workplace who've done well the last 10-15 years now need to pivot, so we're working to help them capitalize on the skills they already have," Dr. Rekart said. "But it's not just SNHU; higher ed as an industry is moving."

Watch the full webinar at https://event.on24.com/wcc/r/2192471/062926C4F3C-F6AE815BFFAC87B1B13D7

1 *Talent investments pay off.* Lumina Foundation.

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The LearningElite is a study in how the best learning teams help their organizations adapt and prepare for change.

BY SARAH KIMMEL

The LearningElite kicked off in 2011 with a deceptively simple mission — to identify the world's elite learning organizations. And for the past 10 years, the LearningElite has been a study in how the best learning teams help their organizations both adapt to and prepare for change.

Since 2017, I would say that preparing for change has been the primary mission of most learning organizations.

For the past two years, the topic of the LearningElite capstone evaluation has been learning and disruption. We have gotten a close-up view of how many of the top organizations have used learning to support their organizations and employees through unprecedented market, regulatory, labor and technological disruptions.

But I don't think any of us imagined that every organization in the world would be facing this current kind of disruption, on this level, all at the same time.

Since we revealed the list of finalists back in February, our LearningElite organizations have spent countless hours in a whirlwind of meetings, trying to respond to the new normal. With all hands on virtual deck, learning leaders have been disrupted beyond belief as they plan their organization's strategy for surviving the COVID-19 pandemic. They have helped employees get needed resources to do their jobs remotely or in person, likely in ways they've never had to do them before. All of this has taken place under trying circumstances in which everyone is distracted, stressed and grieving.

In the spirit of celebrating learning in the face of unprecedented disruption, it is important to recognize the outstanding work all our LearningElite winners did this past year to help their employees and organizations cope with change, learn and grow. And I am personally looking forward to reading next year's applications, because I suspect that everyone will have remarkable stories to tell about what they are doing right now. CLO

Sarah Kimmel is Chief Learning Officer*'s vice president of research.*

Sarah Kimmel presenting the 2020 LearningElite Awards virtually in April.

#1 Agility Amid Disruption

This year, AT&T ranked No. 1 among 52 organizations recognized for exemplary learning and development initiatives.

BY ELIZABETH LOUTFI

Nowadays, companies deputize their learning and development functions to do the critical tasks of reskilling and upskilling workers, ensuring that the entire workforce is prepared for the evolution of work. One thing that is made crystal clear by multinational telecommunications company AT&T's learning strategy is that the company is dedicated to this mission.

"We want our employees to skill up and be a part of this evolution, whatever the three-year, four-year, five-year strategy is," said Jason Oliver, vice president of AT&T University Operations.

AT&T invests roughly $200 million in training initiatives each year, which has allowed the company to complete an average of 16 million hours of training annually. It also invests $24 million annually in tuition assistance in university partnerships.

"We've worked hard to create a culture of learning," Oliver said. "But we've also done a really good job, in my opinion, of being transparent about where the business is heading. It directs the tone and the voice for everything that goes on in the organization, from policy to best practices, from the culture to the learner."

Becoming Future Ready

AT&T's learning strategy is driven by AT&T University, or TU, the company's corporate L&D organization. Oliver, along with TU Vice President of Leadership Amanda Cacheris, oversees a number of programs and resources that make up AT&T's learning strategy, all of which are set in place to help employees become "future ready."

The company's flagship Leading with Distinction program aims to align individual leadership and employee development at all organizational levels with AT&T's corporate strategy.

"It's amazing how learning is truly a part of our organization," Oliver said. "No matter what the business issue is, we're at the center of that table."

Helping learners upskill and grow is a cool position to be in, he added. In February 2017, AT&T launched its Personal Learning Experience. The internal, mobile-friendly tool is available to each employee so they can create their own plan for learning and track their progress. Employees can select from and access training that relates to their current job title or desired position.

There's a number of elements that make up AT&T's learning strategy, Oliver said, but perhaps one of the most important is the technology they leverage. Their learning organization is intended to serve the needs of the learner, and that couldn't happen as effectively without technology, he added.

One of the ways AT&T leverages technology for learning is through its Virtual Studios, where leaders can lead interactive training and development programs. The studio opened its doors in 2013 and currently has 10 control

SNAPSHOT:

AT&T

AT&T

To align with its continuous learning strategy, AT&T partnered with LinkedIn Learning to offer their entire catalog as a learning resource, including courses in business, technology and creative subjects, to enhance and further employees' continuous learning. More than 29,000 hours have been completed thus far.

Company size: 268,000

Location: United States

From left: Jason Oliver, Amanda Cacheris

rooms and 12 stages that can produce an average of 90 hours of live content each day.

The evolution of technology has driven much of AT&T's learning strategy in the past few years. When skills are automated through things like artificial intelligence and machine learning, new skills to be acquired emerge. Oliver said technology has allowed AT&T to scale reskilling initiatives and produce positive results for individual learners.

"What I love is our ability to meet the learner where they are," he said. "Our ability to scale our learning ecosystem and scale reskilling in the way that we now know positively impacts the business … creates an experience that allows the learner to navigate their own path."

Coming Together

An evolving technology landscape and the future of work weren't the only changes AT&T's learning strategy faced in recent years. When AT&T acquired WarnerMedia in June 2018, it meant there were now two workforces that needed to become acclimated to each other's learning strategies.

"We've been in share-mode," Oliver said. The two companies are currently trying to determine which practices to unify and which ones don't work anymore. The goal is to navigate the acquisition collaboratively, so as not to disrupt each other's businesses, but to make each other better.

"These are two organizations that have unique environments and unique perspectives — how can you mesh that?" Oliver said. "Learning is at the center of how you figure that out and how you help those organizations achieve it."

Critical Partnerships

One element of AT&T's learning strategy that plays a key role is the external partnerships they have with companies like LinkedIn Learning, Coursera and Udacity and institutions like the University of Oklahoma.

Since the COVID-19 outbreak, Oliver said these partnerships have gotten even more critical. The top question he was asked at the beginning of the outbreak was regarding all of his leader-led training, the training that happens out in the field, and whether they could leverage technology to keep everything going: "It was like, 'Hey, what can we virtualize? How can we keep people safe?'"

With the help of their providers, Oliver said AT&T was able to launch an online resource toolkit for its employees that gave them access to information about COVID-19, as well as stress and health management tips and instructions on how to leverage technology to keep in touch with others.

2020 and Beyond

AT&T continues to navigate into the future with more than 130 years of archives and data. AT&T is a data organization, Oliver said, and maintains a library of training content and workforce and individual learner data. Their ability to leverage that information has helped them make some assumptions and predictions that have helped their learners and, ultimately, the organization to grow.

This upcoming year, the company plans to focus heavily on leveraging technology, specifically in automating processes within their learning ecosystem and using augmented reality to deliver more training. It all goes back to supporting the learner, Oliver said, because how and what they learn will ultimately impact the business.

"There's a direct connection between how we enable learning, growing and upskilling and just the overall journey of how we're helping make this organization be better and better equipped for what we can predict — or not predict — that's going to happen in the future," Oliver said. CLO

Elizabeth Loutfi is Chief Learning Officer's *associate editor.*

#2 A Better Working World

At EY, learning and development is focused on building skills for the future.

BY KATIE KLEAR

Multinational professional services firm EY employs more than 280,000 people throughout its global network of member firms, serving more than 200,000 clients in 150 countries. Learning is a top priority, and they are constantly searching for ways to keep employees equipped with the knowledge they need to succeed. This earned them the No. 2 spot in this year's LearningElite Awards program.

Staying Updated on Tech

With technology constantly advancing and integrating more fully into the workplace, EY created its Disruptive Technology Program, during which 60-70 leaders congregate in Silicon Valley to garner knowledge in exponential technologies, digital transformation and innovations. It is four days of extensive information on up-and-coming projects and technologies, including presentations and discussion from world-renowned speakers in addition to hands-on experience through a "Tech Zone " at an EY innovation center.

"Senior EY leaders leave this program with the skills to confidently assist clients in the face of technology disruption," said Brenda Sugrue, EY's global chief learning officer.

Skill enhancement at EY extends beyond education of the organization's leaders. Intensive bootcamps are also curated to keep technology skills up-to-date for all employees throughout the organization. RPA Bootcamps were launched by EY to help upskill their people specifically in tech skills.

RPA Bootcamps offer two tracks for learners. For those with process, business or systems analysis knowledge, the Business Bootcamp is available. For those with development and coding experience, the Technical Bootcamp is offered. The training — consisting of EY's take on the best application of materials supplied by software vendors — is followed by RPA project engagements.

EY launched a study to measure the impact of the RPA Bootcamps. They found a 5x increase in the average value of opportunities closed after employees completed one of the bootcamps.

EY Badges

EY instills the learning started in programs and bootcamps into everyday occurrences. Global Chairman and CEO Carmine Di Sibio encourages workers to take every day as an opportunity to learn. EY people have responded to his message positively through high engagement with EY Badges.

EY Badges have quickly assimilated into the learning culture at EY as a mode for employees to upskill current talents and learn completely new skills. Badges can be earned in areas such as artificial intelligence, blockchain, innovation, analytics, teaming and even inclusiveness and belonging.

Badges have been such an effective learning tool that learners carry over their involvement with the program outside of the work environment. Employees

SNAPSHOT:

EY

EY

The EY organization's investment in future-focused skills includes EY Badges, portable credentials in hot skills; intensive bootcamps; and a Silicon Valley-based Disruptive Technology Program for senior executives, helping drive revenue growth in technology-based services and increase learning satisfaction to an all-time high of 81 percent.

Company size: 280,000

Location: United Kingdom





From left: Brenda Sugrue, Chris Pollard, Finola Harrington, Christiana Zidwick, Stefanie Kiell

create outside study groups to help each other complete the rigorous badge requirements. Earning a new badge is valued greatly, and upon mastery of a new skill, employees often share their achievement on social media.

EY completed a comprehensive study to measure the impact of its badges program. They found badge earners had 6 percent higher satisfaction with learning and doubled the value of opportunities closed.

"Studies corroborate positive employee reception of the EY Badges program through the findings of overall satisfaction with learning opportunities as well as a 4 percent increase in intent to stay at EY," Sugrue said.

A Global Endeavor

A highly engaging learning design of this magnitude requires a comprehensive LMS. EY's implementation of their SuccessFactors learning platform — one of the largest and most complex implementations in the industry — is now complete. It reaches their entire employee base and melds the advancements of the technilogical age, specifically cloud-based sharing, and the goal of creating a better working world by providing an all-in, one-stop-shop for employee learning.

The increased virtualization of content through SuccessFactors has benefited learners as well as the organization. The past five years for EY have shown a near double — from 17 percent to 31 percent — in the amount of virtual training and positive employee responses on increasing satisfaction with learning rising from 74 percent to 81 percent.

Worldwide learning presents a considerable challenge. The mode of learning is not universal and cultural barriers come into play. EY acknowledges this and incorporates diversity from program development all the way through to delivery.

EY ensures that the development team itself is diverse, to create truly accessible learning programs. The team poses the need to incorporate cultural nuances in the design as a top priority. The organization abides by a set of standards to ensure content is appropriate in global and regional contexts.

In the case of a program needing slight local alterations based on culture, EY works with the local group. The local team can construct plans for adding or substituting a component and have it reviewed by EY leaders for implementation. Legitimizing the substitute allows local courses to be trackable against the master program.

EY hones its focus on accessibility of learning from the local level to an individual level. Personal purpose is one of EY's core values; the organization aims to help every employee understand why they are pursuing their career and how to achieve their career goals. Attention to employee purpose ties back to building a better working world. Empowering an employee with purpose allows them to use their leadership skills throughout their EY journey or in future careers.

The learning gained through EY's programs has resulted in industry progress in conjunction with preparation for competency in future-based skills. Looking ahead is a top priority at EY, with Di Sibio promoting an organizational mindset based on the long term. The L&D team heeds this by creating programs specializing in skills for jobs that are yet to come.

EY's current programs are aimed at skill building with an emphasis on technology training. The methods of delivering constantly updated skill sets will be innovated as well, in order to keep up with the demands of time and new technologies.

"The global EY organization today is helping more clients, in more places, tackle a wider range of their toughest challenges," Sugrue said. CLO

Katie Klear is a writer based in Chicago.

#3 Engagement at Vi

At Vi, a "leaders as teachers" culture keeps employees hyper-engaged and always learning.

BY ASHLEY ST. JOHN

For the past five years, Vi has been a fixture among the Top 10 LearningElite — with good reason. Its leadership's commitment to building a strong learning culture and its business partners' involvement in the development, delivery and ownership of learning initiatives has created high levels of engagement at all levels of the organization.

"Over the past several years, Vi has made a gradual but significant transition of moving the culture from learning being 'owned' by the learning organization to being owned by the entire organization," said Judy Whitcomb, Vi's senior vice president of HR and learning and organizational development.

Based in Chicago, Vi has worked to enrich the lives of seniors across the United States since 1987. The Vi family of companies includes 10 Life Plan Communities, also known as Continuing Care Retirement Communities. Vi's corporate office supports the efforts of each functional community department, including accounting, food and beverage management, HR, legal, marketing, resident care and risk management.

The organization's ongoing commitment to developing and engaging its people resulted in every Vi location being certified as a Great Place to Work for the past two years. It also was recognized by Glassdoor in 2019 as one of the top 100 employers in the U.S. Ninety-one percent of employees say Vi provides them the training and development to be successful in their roles, and candidates rank Vi's commitment to and reputation for learning as one of the primary drivers of their employment decision — ranking ahead of pay and benefits.

The organization's dedication to learning also landed it in the No. 3 spot among CLO's 2020 LearningElite.

It Starts at the Top

Learning at Vi is aligned with the company's business strategy and driven by a formal L&D governance model.

"During development of the company's annual business plan and budgeting process, associated training, development, performance and change management objectives are developed through Vi's Learning Council and eventually recommended and approved by Vi's executive management team," Whitcomb said. "The Learning Council meets on a regular basis throughout the year to evaluate progress toward the organization's learning strategy."

The involvement of senior executives in execution of Vi's learning strategy has set Vi's "leaders as teachers" culture, Whitcomb said. "Learning and teaching is part of every leader's responsibility."

Vi's learning team provides training for business partners on developing and managing their individual learning microsites, with the organization's partners in food and beverage, housekeeping, engineering, sales and HR providing the content. The team also partners with leaders across the company and former program participants to deliver classroom and virtual training.

SNAPSHOT:

Vi

In response to higher levels of attrition for nursing assistants (CNAs) and culinary employees, Vi launched a career ladder program resulting in savings of more than $1.4 million and a significant reduction in attrition from 24 percent to 16 percent in just 14 months.

Company size: 3,000
Location: United States



From left: Judy Whitcomb, Russ Needham, Jill Denman

To build the competency of its wide range of business partners in delivering training, Vi provides formal instructional design, facilitation and training courses.

"Enabling business partners expands the company's ability to provide training throughout the organization," Whitcomb said. "It creates a greater sense of ownership."

Vi also leverages frontline employees to lead its Wing's program for new employees. Nominated and selected frontline employees go through an extensive training program to act as "Wing Captains" for new employees. And in 2019, former Management Development Program participants were tapped as session mentors for the incoming MDP class.

Vi has a partnership with DePaul University to assist in delivery of certain elements of Vi's Breakthrough Leadership Program as well as development of a comprehensive measurement tool to evaluate the program. Over the past several years, Vi also has cultivated partnerships with universities and trade schools to drive interest in senior living careers.

"Vi has a centralized approach to learning strategy and a decentralized approach to learning execution," Whitcomb said. Each location has trained learning professionals on the team to support initiatives and execution. Functional leaders at the location and at the corporate level also support execution and act as faculty and consultants, and the corporate L&D team leads strategy, execution and program evaluation.

Setting Themselves Apart

Vi operates locations in highly competitive employment markets, Whitcomb said. They compete heavily for talent with luxury hotel brands and large healthcare systems. Therefore, Vi is hyper-focused on talent development to not only deliver quality care, but also to provide career opportunities that help meet retention goals.

In mid-2018, Vi developed two career ladders for culinary and resident care positions with the goal of growing individual competencies and providing employees a career track in roles that traditionally do not have extensive ones. Since the inception of these career ladders, Vi reduced certified nursing assistant attrition from 27 percent at the end of 2017 to 16 percent at the end of 2018 with a trend of 15 percent in 2019. Culinary attrition declined from 27 to 22 percent. The reduction in turnover from mid-2018 to date resulted in cost savings of more than $1.4 million.

Vi also leverages technology to provide a wide spectrum of training and resources for every employee in the organization, the majority of whom work in a 24/7, heavily regulated environment.

"Technology supports the vast number of professional certification programs Vi offers," Whitcomb said. "Vi offers culinary, dining, housekeeping, systems technology, HR and nursing continuing education courses online."

Readying for the Future

Retaining and developing talent will continue to be one of Vi's top priorities, Whitcomb said.

"In 2018, we began to build talent acquisition and development strategies to activate interest in culinary and nursing careers with high school students," she said. "We need to expand our talent pipeline beyond colleges and trade schools."

Vi also plans to continue developing and cultivating apprenticeship programs to support its future talent needs.

While Vi has the lowest attrition across the senior living industry, data shows that more than 40 percent of Vi's turnover is among employees who have been with the company less than a year.

"With the implementation of a new hire survey and a new Wing's program, we believe we will be able to not only understand the reasons for costly attrition, but develop learning, onboarding and consulting practices that will significantly reduce Vi's turnover," Whitcomb said.

If this year has taught the world anything, it's that the future remains uncertain. As an organization providing continuing care to seniors, those among the most vulnerable to COVID-19, few may feel that uncertainty more than Vi.

"So much has changed since 2019," Whitcomb said. "We remain steadfast in our commitment to provide exceptional service and quality care to our residents. We will continue to leverage leadership lessons learned in response to the pandemic and, hand-in-hand with our business partners, provide leadership and support to respond to these changes." CLO

Ashley St. John is Chief Learning Officer's *managing editor.*

#4 The Business of People

Kaiser Permanente's Health Plan Institute focuses on creating a coaching and wellness culture, bolstered by strong communication.

BY KATIE KLEAR

Kaiser Permanente is in the people business. They strive to improve public health through affordable, quality healthcare. Comprising three collaborative and integrated entities, Kaiser Foundation Health Plan, Kaiser Foundation Hospitals and the Permanente Medical Groups, they share a corporate agenda and express it to their combined workforce of more than 200,000 employees. Their learning strategy is crafted to stem from top leadership and has earned their Health Plan Institute the No. 4 spot in this year's LearningElite program.

HPI is responsible for designing and delivering the L&D programs that support the marketing, sales and business development functions of the Kaiser Foundation Health Plan. Its primary audience includes the market-serving positions that provide combined healthcare and insurance coverage solutions to businesses and consumers.

In order to pour out knowledge, according to David Livingston, executive director for HPI, one must constantly take in knowledge. KP leadership take an active role as learners to become better for themselves, their employees and the community. "Most of the folks at the organization with me have learning curiosity — we are lifelong learners, we continue to be informed," Livingston said.

A Coaching Culture

Keeping mental skills sharp for KP executives takes on many forms. Learning leaders often meet monthly to discuss the new implementations put forth in the company and how they are being utilized for maximum effectiveness.

Livingston sets standards for continuing personal growth through a number of initiatives. A book club of Livingston's staff reads and discusses four books a year to update themselves on progressive learning skills. He attends external conferences each year to stay informed on the wider impacts of learning and is a member of the International Society for Performance Improvement.

The desired takeaway from this variety of executive learning is to transport the knowledge to the manager level. KP takes pride in the coaching culture they have created in the company. The skill of coaching is deemed foundational for managers due to the broad impact of improved business performance, a larger manager skill set and the edification of the individual receiving the coaching.

KP managers complete a thorough process to become an accredited coach. It begins with education on coaching skills and translation of that knowledge into action. The managers must go through a practical assessment outside of the classroom to become accredited. Those in training must be observed coaching a coachee and successfully complete two coaching demonstrations. The managers then coalesce for a 90-minute follow-up workshop. Upon completion of this workshop, managers are officially accredited.

After a year, the employee being coached by the newly skilled manager partakes in a coaching effectiveness survey which is then reviewed by KP learning

SNAPSHOT:

KAISER PERMANENTE®

Health Plan Institute, Kaiser Permanente

Since 2018, HPI has delivered nearly 300 mental health first-aid workshops to 7,000 KP staff, increasing mental health literacy by 31 percent and reducing stigma by 21 percent. Additionally, in 2019 HPI piloted a two-day, two-hour version, which received an outstanding net promoter score of 90.

Company size: 180,000

Location: United States

From top: Stacey Page, Irina Carreire, David Livingston, Kevin Kearns, Jacqueline Warner, Gail Gendich

executives to determine a score for the manager's performance. They judge new managers and existing managers on different benchmarks to truly assess the success of each individual. From start to end, the focus is on how to best promote a coaching culture in the organization.

A Focus on Wellness

KP's coaching culture is complemented by a wellness culture focused on physical and mental health. To address mental health wellness, KP created the Mental Health First Aid program. It is a four-hour program designed to reduce stigma.

The program starts with a pre-assessment gauging the knowledge employees have when starting the workshop as well as what they think drives stigma. The class aims to equip learners with the information and tools needed to aid someone who may be dealing with a mental crisis. Immediately following the program, the same assessment taken prior to the class is readministered to measure effectiveness.

The workshop has proven highly successful: 97 percent of participants express learner satisfaction after completion. Twenty-eight percent report an increase in confidence directly after the workshop. The result of the education, satisfaction and newfound confidence is a 16 percent stigma decrease directly after the workshop and a 21 percent stigma decrease three months after the workshop.

Challenging stigmas and mindsets beyond KP employees sparked the creation of KP's Challenger Selling program, a training geared toward salespeople on how to most effectively interact with a customer to spark positive change. The program is designed to teach salespeople to be more than a regurgitator of information in customer conversations and to tailor the insights and delivery to the individual or company. Challenging the current approach the customer maintains in a professional way creates respectful tension and leads to huge impacts, Livingston said.

Learning Reinforcement with Bots

KP tackles knowledge reinforcement through the use of chatbots. Through a company called Mobile Coach, KP has expanded its use of chat to reinforce the education received in key company programs. Every program chat has a designated avatar. Messages received by the employee contain important aspects about the program they've completed in a personalized manner with a tailored bot.

The coaching program, for example, is followed up by chats with "Coach Grover." The chats provide access to the resources and performance tools used in the program, reinforce main elements learned in the program and function as a reminder. Coach Grover provides nuggets of information about concepts in the program and short to-do lists for the managers on a monthly and even daily basis.

Leaders like Livingston have used the bots as a communication method outside of program reinforcement. The chat provides a level of informality that keeps daily communication more engaging. Livingston uses it to keep his staff up to date on his current projects and organization news. The chatbots have been a communication vehicle to help keep the entire organization connected.

Constantly Evolving

KP's programs have led them to be named among the LearningElite, but they won't plateau now, Livingston said. They will continue to provide education to the entire community supporting their goal in providing affordable quality health care.

The basis for improvement stems from internal and external communication. KP combines the scorecard feedback received from the LearningElite Awards and information from stakeholders and internal reviews to pinpoint areas for growth. The learning team then picks one to two tools or processes to focus on for the upcoming year. From that, a new program is designed and test piloted all while current programs are under review and evaluation. CLO

Katie Klear is a writer based in Chicago.

#5 Heads Up for Learning

KPMG's "heads-up" learning culture consists of anticipating change, collaborating with clients and focusing on innovation.

BY ELIZABETH LOUTFI

For the second year in a row, KPMG ranks among the LearningElite Top 5. The accounting, tax and advisory firm has spent the past year creating a workplace culture that supports a multifaceted learning strategy, which sits on a foundation of technology, supportive leadership and a brand-new training and development facility, the KPMG Lakehouse.

Realizing that culture and learning within an organization are inextricably linked, the company's learning strategy is being supported by what KPMG Chief Learning Officer Corey Muñoz calls a culture of "heads-up" learning, which he said is a greater emphasis on anticipating change, collaborating with clients and focusing on innovation.

In the past, KPMG's culture was very heads-down, Muñoz said, focusing simply on working on the task at hand. Being heads-down is important, but not all the time, he said, and the organization wanted to do more in anticipation of the future of work.

Welcome to the Lakehouse

The KPMG Lakehouse, which opened its doors in January, represents a large part of the company's L&D focus. The 55-acre facility has 800 single-occupancy rooms for KPMG's 32,000 employees and partners, who will each spend a week there engaging with classroom instruction, instructor-based learning and digital experiences. The facility also has 90 learning and innovation spaces and a 1,000-seat town hall area to be used for networking activities and think tanks.

Even though many organizations are moving away from brick-and-mortar learning facilities and classroom and instructor-led training, KPMG is still fully invested in the "experience-based classroom" strategy, Muñoz said.

"I fully believe, and the firm fully believes, that if we give people a space and a safe environment where they can practice behaviors, they are definitely more likely to take it back to how they interact with clients and, more important, how they interact in their local offices," he said.

Muñoz said classrooms at the Lakehouse were built with this in mind: Each classroom has a door that opens to the outdoors. He said the facility design was a crucial step in creating the Lakehouse because they wanted learning to continue outside of the classrooms. "It's the reverse-Vegas rule: What happens in the classroom doesn't stay in the classroom," he said.

KPMG employees will only spend one week at the Lakehouse, so Muñoz said they spent a lot of time designing the experience there so learners can easily bring lessons back with them to their clients and home offices. Ultimately, it's a big learning laboratory, Muñoz said, and it's also become a headquarters for their culture of heads-up learning.

Even KPMG interns will get to attend training at the Lakehouse. A January intern group comprised the Lakehouse's inaugural session: Every year, the organization hosts its National Intern Training, a week-long, comprehensive event.

SNAPSHOT:

KPMG

KPMG

As part of an ongoing effort to help its clients understand U.S. tax reform, training on international tax impacts led to a 237 percent year-over-year increase in sales of KPMG's International Tax Reform Analyzer tool.

Company size: 44,000
Location: United States

From left: Alexa Cabal, Jeremy Manjorin, ChinParn Kwan, Stephanie Haueis, Stacey Jewesak

Interns are KPMG's lifeblood from a talent perspective, Muñoz said. The annual training is where interns learn what KPMG is all about, and the retention rate of their interns is crucial. Last year, 91 percent of the 3,000 training attendees chose to continue on at KPMG as associates.

"Making sure we have that high retention rate, the transfer rate from intern to full-time employee, is key for our success," Muñoz said.

Digital Learning

KPMG is invested in and focused on its workforce having a continuous learning mindset, which is supported by their now-multifaceted learning strategy, Muñoz said.

"We continue to focus obviously on the classroom experience, and what we're doing at Lakehouse is a big part of that," he said. However, they also see immense value in digital learning assets. The organization uses a learning management system that is continuously being improved or updated, with plans to move it to a cloud-based version later this year.

KPMG is also making strides in ensuring its professionals can access training and information when they need it. Last year, KPMG professionals logged more than 100,000 completions of digital learning resources, a 50 percent increase over the previous year, and earned an average of 52 continuing professional education credits — each which amounts to an hour of formal training — per person.

Measuring Success

To ensure its learning strategy is aligned with business goals, KPMG's measurement strategy is robust. Rather than starting with the focus on key performance indicators from a program or training, the organization instead begins by defining their business challenges, identifying how they should be solved (i.e, what changes in performance need to happen) and what analytics they should track to look for progress.

KPMG's data-collection and evaluation efforts have evolved from using the Kirkpatrick Model to a three-tiered one, engaging business stakeholders early on to create developmental, formative and summative evaluation objectives that dedicate time to determining KPIs and assessing them before, during and after implementation of a learning strategy.

"We're shifting the conversation around how we think about measurement and KPIs, but we're also focused on culture," Muñoz said. "The culture and the environment in which [our people] operate is extremely important, so we're tracking how people understand and demonstrate our core values."

During its first few months of being open, before temporarily closing its doors during the COVID-19 pandemic, the Lakehouse has seen measurable success. Once in-person training can resume, Muñoz said he believes their current exploration of virtual and informal learning approaches will help strengthen their learning strategy.

Commitment to Learning

Looking ahead, Muñoz said the organization plans to spend a lot of time focusing on best practices to enhance learner experience. This includes exploring everything from programs supported by augmented and virtual reality to LXPs to in-person learning and training.

Part of what Muñoz said makes KPMG's learning strategy so robust is the support they get from leadership across the organization. "This is part of our business model, and it's an extremely visible sign of commitment to learning," he said.

KPMG has about 2,300 leaders who actively teach or facilitate learning programs. A Leaders at Lakehouse initiative also exists to support leaders who are actively involved in the day-to-day operations and experiences at the learning facility. A lot of leadership stays to interact and network with the groups after they're done instructing, Muñoz said.

"I think our leaders are extraordinarily committed because they understand the importance of learning," he said. "It takes not only an investment in resources, but it's an investment of time, which I think we all know, at the leadership level, says a lot." CLO

Elizabeth Loutfi is Chief Learning Officer*'s associate editor.*

2020 LearningElite

6 **MTM**
In 2019, MTM Training revamped its leadership development program to include deeper immersion into operations and organizational culture. More than 50 percent of the participants in this program were promoted into a new role after demonstrating attainment of new leadership competencies and skills.

7 **Department of Veterans Affairs Acquisition Academy**
The Academy's Training More with Less Initiative increases education opportunities through innovation, using e-learning, instructor-led virtual classrooms, mobile device platform training and off-site classes. This initiative also reduces travel costs, employee absences from the workplace and overall training costs.

8 **ManTech International**
In 2019 ManTech implemented Skillsoft to make learning opportunities as accessible as possible. Eight months into implementation, an unprecedented 75 percent of the workforce is consuming Skillsoft content on topics to advance employees' technical and business acumen.

EDITOR'S CHOICE AWARDS

Chief Learning Officer recognizes the following organizations for Best Small Company, Best Midsize Company, and the highest scorers in each of the five dimensions considered during judging:

Learning Strategy:
KPMG

Leadership Commitment:
Health Plan Institute, Kaiser Permanente

Learning Execution:
AT&T

Learning Impact:
Vi

Business Performance Results:
EY

Best Small Company:
Vi

Best Midsize Company:
Nemours Children's Health System

9 **Sidley Austin**
During the past year, Sidley Austin offered more than 1,500 educational programs to its lawyers, staff, alumni and clients around the globe. In keeping with the firm's culture of learning, 91 percent were developed and 95 percent were delivered by Sidley personnel.

10 **Emory University**
Emory University implemented the Change Academy. Using classroom sessions and online collaboration groups, participants implement best-practice change-management tools in a lab environment while receiving expert and peer coaching. Emory's president and executive vice presidents also use the Change Academy with their teams for university-wide changes.

11 **Nemours Children's Health System**
Nemours has high engagement and outcomes from its leadership development programs. Retention rates for participants upon completion average 99 percent. Its physician program has seen 42 percent of program participants receive an internal promotion.

12 **Enterprise Holdings**
In 2019, an independent regional subsidiary of Enterprise Holdings set a goal to increase its number of minority employees in management positions. By modifying training, amplifying mentorship and developing committees, they succeeded, seeing a 9 percent increase in the minority population among their management ranks.

13 **ADP**
In 2019, one business area rolled out Personalized Client Implementation training. This reduced client training by 30 percent, significantly decreased the processing time of clients' introductory calls while dramatically enhancing the overall learner experience of client implementation training.

14 **ICICI Lombard General Insurance**
In 2019, ICICI Lombard piloted its first agile skill building program, saving nearly $40,000 in learning costs and enhancing skill competency by 71 percent.

15 **Memorial Health System**
The Emergency Department Nurse Onboarding program at MHS was revamped to educate utilizing multiple methods, addressing the skills and knowledge needed to care for the diverse patient population. This resulted in a decrease of first-year-of-service turnover for nurses from 18.4 percent to 9.1 percent.

16 **CVS Health**
CVS Health's self-paced LearnRx Pharmacy Technician program blends didactic learning, classroom learning and on-the-job training with an internal coach. Eighteen-thousand pharmacy technicians completed this program in 2018. Upon completion, they partner with their pharmacy managers to review assessment results and identify opportunities for continued skills development.

17 **U.S. CBP, OTD**
CBP developed and implemented a five-day Team Leader course. Targeted at the 40,000 nonsupervisory employees, it provides the foundational leadership skills for those in (unofficial) leadership roles while providing a professional head start for many of those who will eventually transition into formal supervisory positions.

WINNERS CIRCLE

2019 Organization of the Year:
Nationwide

2018 Organization of the Year:
Accenture

2017 Organization of the Year:
Defense Acquisition University

18 **Blue Cross NC**
Blue Cross NC's Fall Release for Open Enrollment was converted to 70 percent digital content, resulting in cost avoidance of approximately $114,000. This personalized approach embedded assessments that drastically reduced lost productivity while improving demonstrated mastery of the desired outcomes.

19 **New York Life**
New York Life successfully transitioned technology training spend to 100 percent learner discretionary training stipend with zero increase in the overall training budget. Also, there was a 60-point swing in the nature of the spend from legacy skills to future-focused skills.

20 **CareSource**
CareSource University's Functional Facilitator program teaches subject matter experts throughout CareSource the skills needed to be effective learning facilitators. In 2019, 56 certified Functional Facilitators along with CareSource University supported the organization in implementing six new software applications affecting 2,900 employees.

21 **PJ Lhuillier**
PJ Lhuillier employees became champions of financial wellness that helped convert Filipinos into Iponaryos. In four months, more than 2 million Filipinos now have their own savings account as a part of PJ Lhuillier's social mission to provide financial inclusion to the underserved sector of the Philippines.

22 **BKD**
Level Trainings focus on efficiency, following SOPs and using technology to enhance productivity. BKD's increased productivity is demonstrated by its auditors completing approximately 3,945 audits in 2018 and 4,408 in 2019 — a 12 percent increase, which can be partially attributed to effective training.

23 **Dish Network**
In 2019, Dish Network's Sales and In-Home Services training teams collaborated to deliver custom sales science content to its technicians, resulting in a $40 million sales increase in Smart Home Services products.

24 **TVA**
TVA delivered a specialized coaching program to 400 leaders in the operations organization. The program was requested by the COO and participant feedback indicates that it was successful in improving coaching behaviors.

25 **Procore Technologies**
In 2019, Procore trained 16 leaders to become certified internal coaches. This has scaled its coaching program. To date, more than 50 percent of all employees have been through one-on-one coaching and more than 65 percent have been reached by the coach approach that this program has implemented.

26 **UL**
In 2019, UL addressed the need to rapidly develop international talent through an in-house problem-based learning framework that is customizable to any business or location, multiplying the regional development program offerings from China, Japan, Korea and India to include Latin America, Europe and (soon) ASEAN.

27 **Love's Travel Stops and Country Stores**
In 2019, Love's brought the daily average number of users accessing learning content from 2,000 to 8,000 through implementing new access points and driving the focus to user-centered learning.

28 **DVA, OIT, TMO**
In 2019, the Talent Management Office engaged 50 OIT senior leaders as instructors to deliver 10 manager training courses. These courses achieved a 96 percent effectiveness rating and avoided millions in vendor costs.

29 **Sysco Corp.**
In 2019, Sysco executed on its leadership development strategy by creating and deploying both its Basecamp 2.0 program, touching more than 7,000 field leaders, and its Sales Leadership Orientation, touching 160 new front-line sales leaders. These programs focused primarily on coaching, leading and maximizing routines.

30 **Zions Bancorporation, N.A.**
In 2019, Zions Bancorporation enhanced its leadership development focus. Bank executives and HR leaders conducted talent assessments, created comprehensive talent reviews, identified top talent and engaged them and their leaders in comprehensive development planning. As a result, 475 employees will receive individualized, targeted development opportunities.

31 **Bankers Life**
Bankers Life went back to basics that worked for more than 20 years, rebuilding content and delivery of a long-retired but well-loved and respected course. The new course, with online interactive pre-work components and a classroom workshop, resulted in a 40 percent increase in agent production.

32 **Subway**
Subway launched the Sandwich Artistry training program, which improved guest satisfaction numbers for high adopters of the program — who achieved an average of 86.3 NPS — versus low adopters achieving 59.7. Franchisees who completed the revamped instructor-led training have seen an increase in average unit volume of $565 per week.

33 **Siemens**
As a member of the American Workforce Policy Advisory Board, Siemens U.S. CEO Barbara Humpton led efforts to promote employer-led training investment in partnership with Learning Campus. This led to an increased awareness of the role learning will play as artificial intelligence and robotics change the workforce.

34 **CDSE**
On July 24, 2019, CDSE hosted its third DoD Virtual Security Conference. The theme for the conference was "Trends, Changes, and Challenges." More than 1,000 security professionals from more than 40 different agencies and services across 18 countries participated.

2020 LearningElite

35 State Compensation Insurance Fund

State Compensation Insurance Fund has empowered employees to find and solve inefficiencies and roadblocks to completing work by teaching design thinking. To date, more than 17 processes have been eliminated or improved and more employees are finding ways to make work efficient, engaging and rewarding.

36 Siemens Healthineers

PEPconnect, PEPconnections and the Virtual Social Enterprise enable Siemens Healthineers to provide online learning to both employees and customers in a relevant, digital format, focused on putting the user in control of their education.

37 FDIC Corporate University

The FDIC's just-in-time approach to examiner development aligns training with on-the-job application while enabling both push and pull learning strategies. This approach also reduces time in training and training travel costs.

38 G4S Secure Solutions USA

G4S is committed to the internal development of talented individuals. To support this effort, the G4S NA RLP was implemented in 2017. To date, 78 employees have participated in the program with an impressive 98 percent retention rate and 15 promotions to senior leadership roles.

39 Air New Zealand

In 2019, Air New Zealand launched Project Mana, a literacy and numeracy program. The program scaled across five regional airports and is designed to develop knowledge and skills that help employees realize their full social, cultural, economic and career potential. The program increased employee literacy and numeracy skills by 72-100 percent.

40 Veeam

In 2019, Veeam developed a new onboarding program in response to key business goals, including reducing the time to productivity for new hires. The program has reduced the time to making the first customer call by 50 percent and time to full productivity by 20 percent.

41 North Highland

North Highland seized an opportunity to reshape its workforce and develop junior people through its Academy program. North Highland enabled this talent to quickly adapt to projects and generate high demand. The Academy team has grown by 900 percent and increased firm revenue by more than $5 million.

42 Caterpillar Financial Services

Through a clear and consistent approach to learning by developing job-role based learning curricula on a global basis, delivered in local language, on one global platform, Cat Financial launched a comprehensive leadership program with three defined pathways to continually develop emerging, existing and experienced leaders.

43 Collaborative Solutions

Collaborative Solutions successfully onboarded 364 new hires in 2018-2019, a 187 percent increase from 2017. It also managed to achieve an 81 percent NPS from these new hires.

44 Mariani Premium Dried Fruit

Mariani increased its new temp retention rate by 65 percent by implementing the Ambassador Program to provide structured training for employees. Prior to launch, retention was less than 10 percent. Now retention remains steady at 67-75 percent, representing approximately $20,000 in training labor savings annually.

45 Persistent Systems

Learning needs focus and dedicated time. Pledge to Learn is an initiative to drive organizationwide upskilling in digital technologies. It invites employees to make commitments of four, eight or 12 hours a month and enroll in courses offered by Persistent University. Two-thousand employees have pledged and upskilled in digital technologies.

46 Zurich Insurance

In 2018, Zurich Insurance rolled out a global leadership development program for Zurich leaders aimed at aligning Zurich's leadership to its purpose, values and behaviors. As a result, Zurich Group's eNPS increased more than 30 percent compared with previous years.

47 Forty Winks

In 2019, Forty Winks launched its Learning League, an online learning platform, to franchisees. The platform launch has seen 94 percent participation and an increase in bedMATCH profiling, resulting in sales and profitability increases across the network.

48 PV Fluid Products

After launching its shop floor cross-training initiative in March 2018, PV Fluid has seen a 12 percent reduction in turnover, a 66 percent reduction in time to train and a floor coverage increase ranging from 34-75 percent, resulting in approximately $145,000 a year in training costs and an ROI of 428 percent.

49 Mezocliq

In 2019, Mezocliq revamped its onboarding for its data governance web app. This reduced learning from 52 weeks to eight weeks. A training expenditure of $350,000 served 150 employees and three clients and was supported with input from the CEO, with new hire speed to competency increasing by 95 percent.

50 SWBC

Training & Employee Development launched a revamped security awareness training. The training centers on cybersecurity and physical security. A survey was sent out to all participants, and survey responses indicated that 100 percent of the employees who took the training stated it changed their behavior.

51 Southern California Edison

As part of the SCE learning strategy, the Empower program gave first-time managers one-to-one coaching to build capabilities and skills faster. Approximately 4.6 out of five workers said coaching made them more effective at their job and helped them make meaningful progress toward their goals.

52 Syneos Health

Thanks to a bespoke workshop held at two investigator meetings (U.S. and Europe), Learning Solutions was able to re-engage and motivate the audience to meet recruitment targets for a clinical study. In the three months following the workshop, recruitment increased by 28 percent.

Developing the Next Generation of Physician Leaders

BY PATTI ADELMAN

Physicians are the perfect candidates to take on the demanding role of health care leadership. But they will require leadership development, as little in the formative portions of their careers prepares them for many of the skills and responsibilities inherent in leadership.

Great organizations possess great leaders, and health care organizations are no exception. As the face of the health care industry continues to change, there is an overriding need for leaders who possess both clinical expertise and substantial leadership abilities.

The health care environment, like all business environments in 2020, faces challenges never seen before. The COVID-19 pandemic that has ravaged the world is the most obvious, and the future remains uncertain. But even once we move beyond this frightening time, many other challenges are afoot.

The health care industry is transforming not only at a rapid pace, but on numerous fronts at the same time. From cost containment to patient privacy concerns, questions about quality care and transparency to an uncertain future, there is a responsibility to address the needs of the business and health care consumer simultaneously. Executives industrywide are trying to discover the necessary answers in this ever-changing environment.

Regardless of the concepts that will or won't affect us even a few years from now, one thing is certain: The degree of leadership complexity and knowledge will need to increase substantially over time.

Traditionally, physicians are not trained, socialized or expected to play well together within organizations.

Distinguishing Between Managers and Leaders

The fast pace of change and competing priorities within the health care environment "have created an urgent necessity for strong leaders at all levels in health care organizations," according to "Distinguishing Competencies of Effective Physician Leaders," a paper published in the May 2015 issue of *Journal of Management Development*. Truly progressive organizations are looking to engage physicians in becoming a part of the essential organizational leadership roles addressing these critical issues and ultimately in decision-making. This, according to MB Guthrie in "Challenges in Developing Physician Leadership and Management," is because many of the issues confronting health care organizations can only be solved with physician involvement, partnership and understanding. There is an increased need for the physician's knowledge, clinical skills and, in an environment of limited resources, understanding of how business decisions directly impact the provision of patient care. Physician participation in decision-making is not only a necessary tool to achieving other physicians' participation in the state of desired change, but it provides opportunity for there to be an intermediary voice between clinical providers and organizational management, minimizing miscommunications and maximizing agreement and understanding, Guthrie writes. Physician leaders have a unique understanding of the physician mindset, which is a completely different mindset than that of the typical health care executive.

Leadership used to be about getting results, regardless of the way they were obtained. In today's business environment, there is recognition that the person in charge can have a large impact on the company's workforce and its outcomes. According to a 2014 Gallup Workplace article, "Why Your Workplace Wellness Program Isn't Working," leaders can account for up to 70 percent of the variation in how engaged employees are with their employers. In addition, Gallup's "State of the American Manager" report revealed that one in every two adults in the United States, at some point in their career, has left their job due to their manager.

Although the common vernacular may use the words "manager" and "leader" interchangeably, there is often a distinction between the skills and displayed behaviors of the two. In his article "What Leaders Really Do," John P. Kotter states that leadership and management are each unique and have their own functions within the business environment. A manager is usually the individual who works in the present day to day to coordinate the efforts of their employees to accomplish the business goals and objectives by efficiently and effectively utilizing available resources. The manager helps the organization, particularly large organizations, maintain consistency in the areas of quality and profitability. A leader is an individual who leads or guides other individuals, teams or entire organizations into the future, according to Kotter. A leader is responsible for setting direction, innovating, inspiring trust and challenging the status quo. A leader assists the organization with managing change. Not everyone can be effective at both leading and managing because, "Some people have the capacity to become excellent managers but not strong leaders. Others have great leadership potential but … have great difficulty becoming strong managers."

Whether they possess a clinical or business background, health care requires individuals who can take on the role of leadership, capitalizing on preparing the workforce for a focus on high-quality, customer-centered care and collaboration across departmental boundaries. In order to accomplish these organizational initiatives, leaders in today's environment require the skills of organizational awareness, emotional self-control, empathy, influence, relationship building and a positive outlook, write Michael J. Dowling and Charles Kenney in *Health Care Reboot: Megatrends Energizing American Medicine.*

What Makes an Effective Leader?

There has been much research conducted regarding the skills required to be an effective leader. As a matter of fact, for each individual who has studied effective leadership, their own distinct definition and version of the accompanying theory has been offered. Each explanation has its own unique theoretical groundings, empirical support and application to problems found in the business world.

Although there are many different leadership theories and styles, they all have one thing in common — influencing team members to accomplish a common task or an organizational goal. In her article, "A Meta-Analysis of the Relationship Between Emotional Intelligence and Effective Leadership," Lane B. Mills states that there are three common elements to leadership: group interactions, utilizing influence and attaining goals. Great leaders work hard to drive success for both themselves and their organization. According to research conducted by Daniel Goleman detailed in *Leadership That Gets Results*, the most effective leaders use not one leadership technique but a variety of leadership styles, applying each of them at the right time and in the right situation. Each style has a unique impact on culture and results for an individual team or an entire organization. The benefit of having multiple techniques is the ability to be flexible and adjust in each circumstance to ensure the best results are obtained.

Although this new environment requires physicians to step up and participate as equal members of the transformational leadership team, many question whether or not they are instinctively prepared for this new and expanding role. How do the physician leaders of today and tomorrow know how to perform these indispensable expertise when little in the formative portions of a physician's career prepares them for these types of leadership responsibilities?

Effective leadership requires the capacity to work collaboratively, display empathy and obtain buy-in from various interdisciplinary stakeholders. Physicians, like other leaders, are expected to succeed in an environment where they not only lead themselves but help to develop the clinical and leadership skills of others, something that is in opposition to the development of their clinical competencies. Traditionally, physicians are not trained, socialized or expected to play well together within organizations. Rather, physicians have historically been taught, through medical school and residency programs, to focus their attention on providing excellent individualized patient care by establishing expertise and amassing an ever-growing base of medical knowledge, according to the Accreditation Council for Graduate Medical Education.

The shift from clinician to leader is a hurdle that requires mental flexibility and fortitude.

Medical schools are steeped in tradition, and the curriculum has remained relatively consistent over the past century. Physicians are traditionally prepared "to be independent thinkers, skeptical scientists and self-reliant professionals," write Stuart Henochowicz and Diane Hetherington in "Leadership Coaching in Healthcare." The professional culture emphasizes autonomy, self-directedness, analytical thinking, prompt decision-making and confidence, and it displays little tolerance for ambiguity.

In providing patient care, clinical departments/specialties are often like independent silos, which further undermines collaboration and encourages physicians to notice specific abnormalities and variations before noting generalizable patterns. As clinicians, physicians are praised for this type of behavior, Guthrie writes. However, this is in contrast to the role of an executive, who has the key leadership skills of collaboration, delegation and ability to address a multitude of issues simultaneously.

Getting Physicians the Leadership Skills They Need

In "Developing a Leadership Pipeline: the Cleveland Clinic Experience," the authors state, "Because competencies to lead differ from clinical or research skills, there is a compelling need to develop leaders and create a talent pipeline." As a reaction to the milieu's mandate, health care organizations need to either include physicians in their current ongoing leadership development activities or develop new programs that take into account a physician's previous training (including methodologies) and work to better meet the specific needs of this population and the role they will play in the future of the organization. The organizations and its physicians will benefit from taking a proactive approach to advancing their readiness, including developing a leadership skill set that will allow them to perform highly at the bedside with patients as well as in the business environment with their team members and other executives.

Anyone who has worked in organizational development or in the learning environment recognizes that it takes time to acquire the attitudes, behaviors and knowledge needed to successfully participate as an organizational member. David Battinelli, chief medical officer at Northwell Health, states that in his experience, "It usually takes about six to nine months for

PHYSICIAN LEADERS continued on page 52

The Future is Female at Kimley-Horn

BY SARAH FISTER GALE

In male-dominated professions, finding and keeping talented female employees can be a constant challenge. It's not enough to just hire strong female candidates. Companies need to create a culture and an environment where they can thrive, said Lori Hall, senior vice president and director of HR for Kimley-Horn. She believes that specialized training can be an important part of the solution.

Kimley-Horn is a 50-year-old planning and engineering design consultancy that provides infrastructure and land development planning and services to a diverse range of public and private clients. Headquartered in Raleigh, North Carolina, it currently has more than 3,500 employees in offices across the U.S. and expects to expand to up to 5,000 by the end of the year, according to Hall. She anticipates that many of those candidates will be women.

Shifting the Talent Pipeline

"For a long time civil engineering was dominated by men," Hall said. Civil engineering programs at colleges were majority male, which meant college recruiting brought in more male candidates than female. Since the company encourages new hires to build careers in the business, that ratio of men to women was always skewed.

But that is starting to change, Hall said. More women are entering engineering programs, and Kimley-Horn recruiters actively seek them out. Horn anticipates that roughly half of the new hires in 2020 will be women. "When more women enter the civil engineering profession, it is good news for us," she said.

But Hall has discovered that getting women in the door is only part of the battle. "We want people to spend a long time with Kimley-Horn, but at some point we realized that we had a retention problem with women," she said. They noticed that at the four- to eight-year mark in their careers with the company, women were opting out. In 2014, Hall decided to find out why.

Her team interviewed several female employees and started to hear similar stories. Many women were reaching a point in their careers where they were beginning to build their own client bases, which came with long hours, high pressure and challenges to figure out how to transition from team member to team leader. At the same time they were building families and getting established in the community.

SNAPSHOT

Kimley-Horn's LIFT initiative helps female engineers take the next big step in their careers.

"We listened, and then we thought about how we could help all of the women feel more supported," Hall said.

In response, later that year the senior leadership team launched the Lasting Impact for Tomorrow initiative, or LIFT, to support women in the workplace as they built their careers. LIFT became an umbrella for a number of programs, ranging from leadership training and mentoring to emergency child care. One of the most powerful programs to emerge is the LIFT Leadership workshop run by Flynn Heath Holt, a leadership development firm based in Charlotte, North Carolina, that focuses on supporting women leaders.

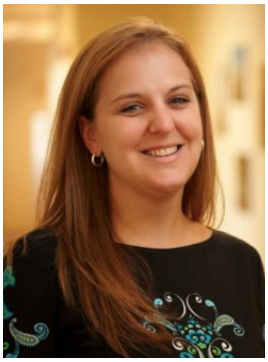
"Our secret sauce is combining coaching and training with help building peer networks," said Jill Flynn, a partner at Flynn Heath Holt. To create the program, her team met female leaders across Kimley-Horn and then used their feedback to customize the content around the company culture and common challenges and experiences women face in the company.

Fireside Chats

Each cohort of female leaders takes part in two two-day offsite workshops that occur about four months apart. The cohorts intentionally include a diverse set of women from across the organization, many of whom work in offices where they may be the only female practice leader. Senior female leaders from across the company also attend the workshops to act as advisers and mentors to the trainees.

Prior to the first workshop, facilitators reach out to trainees to talk about their goals for the training and what they hope to accomplish. Then in the first session, facilitators focus on helping trainees develop self-awareness, said Mindy Levy, executive coach with Flynn Heath Holt. "We talk about how to show up and how to be a powerful person in a room full of people."

The workshops include many group activities and discussions about the challenges women face and how to overcome them. It's a great way to find commonalities and to build a personal network in the company, said Adrienne Ameel, an engineer at Kimley-Horn's Washington, D.C., office who went through the program in 2016. "I felt like we were all there to help each other."



> "FAILURE HAPPENS WHEN LEADERS ASSUME THEY KNOW WHAT THE ISSUES ARE, WHEN REALLY THEY HAVE NO CLUE."
>
> — Lori Hall, senior vice president and director of HR, Kimley-Horn

One of the most popular events in the workshops is the fireside chat, in which a senior leader shares their own career story and answers questions. In many cases these leaders talk about the challenges they faced coming up in the company or missteps they made along the way. "Seeing a successful person say 'I made a mistake and I overcame it' is very encouraging," said Kelly Sizemore, HR manager for Kimley-Horn. "It's powerful for other women to hear that."

Outside of the group activities, participants take part in one-on-one coaching with their facilitators where they work on skills like promoting themselves, having client conversations and shaping their personal brands. The facilitators often tape their performances and then offer feedback on everything from their facial expressions to their word choice, responses and body language, explained Sizemore, who helped shape the curriculum.

Giving trainees the chance to see themselves in action and to identify opportunities to improve can be a powerful learning tool, Levy said. The facilitators also help trainees identify their professional goals and the obstacles in their way, then they establish a plan to overcome them.

That one-on-one coaching had a huge impact on Ameel. She joined Kimley-Horn in 2005, and by 2016 she was ready to become a practice leader, but she wasn't sure what direction she wanted to go or how to get there. "One thing I didn't realize I had an issue with was lack of confidence," she said.

The Big Ask

Levy, Ameel's facilitator, connected with her on the phone before the first workshop and they immediately clicked. "Mindy helped me identify what I was struggling with and how to take hold of my career," Ameel said. In the workshop, Levy helped her set specific goals to address her lack of confidence, which included taking on leadership roles, speaking in front of large audiences and honing her personal elevator speech. Flynn noted that women often miss opportunities to promote themselves to senior people by not taking advantage of casual interactions. They talk about the weather or ask polite questions instead of talking about their work and what they are accomplishing. "They are giving away opportunities to plant a seed," Flynn said. The elevator speech teaches them how to plant that seed.

The facilitators also help every trainee identify a "big ask" and how to go for it.

For Ameel, that was asking to take a leadership role on a major D.C. transportation project, which was where she wanted to focus her practice. When the current project lead left the project, instead of hoping she'd be tapped to take it over, she stepped up. Ameel recalls practicing the conversation with Levy on the phone. "I was very nervous," she said. But it went smoothly and her supervisor said yes right away. "I would never have done that if I hadn't gone through LIFT," Ameel said. "They helped me see that I have to advocate for myself, because if I won't, who will?"

Closing the Gap

Kimley-Horn runs the workshops every 18-24 months, and the feedback has been resoundingly positive. "Every group finds such value in it," Sizemore said. And the impact is measurable. The women who go through the program consistently land more projects and bring in more business, and their retention is now consistent with their male colleagues.

Hall believes leadership workshops and other targeted programs can be powerful tools to support women in any organization, though companies have to be sure they engage female employees in the process. "If you aren't going through the process of getting feedback, you won't understand their experiences," she said. "Failure happens when leaders assume they know what the issues are, when really they have no clue."

She also notes that it can't just be driven by HR. "All the leaders have to live it and hold others accountable if you want these programs to work." CLO

Sarah Fister Gale is a writer based in Chicago.

L&D in COVID-19 and Beyond

The novel coronavirus has upended life and work as we know it. What's next for learning and development?

BY ASHLEY ST. JOHN

A few short months ago, few could have predicted the way that COVID-19 would ravage the world, shaking our personal and professional lives to their core and casting uncertainty over the future of how we work, socialize and, yes, even learn.

With unpredictability comes trepidation. *Chief Learning Officer*'s Business Intelligence Board is currently conducting its "2020 Learning State of the Industry" survey, which is seeing a large spike in participation this year. And responses so far indicate a substantial drop in optimism about the immediate future of learning and development. So far, 54 percent of respondents express an optimistic outlook for L&D for the next 12-18 months, compared with 71 percent in the 2019 survey (see Figure 1). Twenty-six percent say they are less optimistic about the outlook compared with only 7 percent in 2019.

The *Chief Learning Officer* Business Intelligence Board is a group of 1,500 professionals in the learning and development industry who have agreed to be surveyed by the Human Capital Media Research and Advisory Group, the research and advisory arm of *Chief Learning Officer* magazine.

In the face of mass shutdowns across the U.S. starting in mid-March, businesses have been forced to lay-off and furlough huge swaths of the workforce, resulting in a rapid spike in unemployment and other cost-cutting measures. It's a stark contrast to what was a period of steady economic growth heading into 2020. In the 2019 State of the Industry report, 88 percent of respondents said they expected their organization's spending on L&D to increase in the next 12-18 months, with only 10 percent predicting a decrease in spending (and 2 percent unsure). The numbers this year tell a far different story: While 28 percent agree or strongly agree that their spending will increase, 46 percent anticipate a decrease (see Figure 2).

Unsurprisingly, there has also been a sharp uptick in the number of learning leaders saying they are likely to adopt new training techniques and that their blend of training delivery methods will change. These have been ongoing trends for some time, but as many organizations have pivoted to working remotely — a move which may continue to be far more prevalent even beyond the pandemic than it was before — education and development will need to be delivered via an even broader and more accessible range of modalities than ever before. According to responses collected so far through the 2020 State of the Industry survey, 81 percent of learning leaders plan to adopt new training techniques, 70 percent say their blend of training delivery methods will change, and 73 percent plan to develop more custom content (see Figures 3, 4 and 5).

It's impossible to say for sure what happens next — from this summer to next year and well into the future. Learning executives have long acknowledged the importance of being agile and flexible in a volatile, uncertain, complex and ambiguous, or VUCA, world. This has never been more true, and while the immediate future likely won't be comfortable, it will surely be a time to innovate and experiment. CLO

Ashley St. John is Chief Learning Officer*'s managing editor.*

Figures' source: Chief Learning Officer *Business Intelligence Board's "2020 Learning State of the Industry," N=862. All percentages rounded.*

FIGURE 1: OUTLOOK FOR L&D OVER THE NEXT 12-18 MONTHS

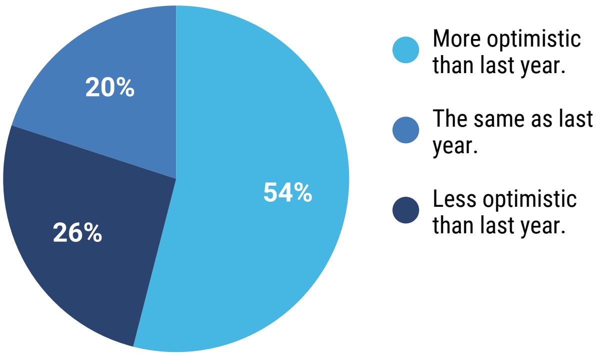


FIGURE 2: MY TRAINING BUDGET IS EXPECTED TO INCREASE

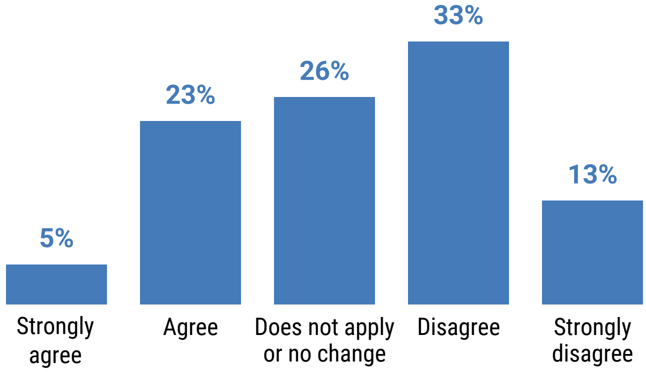


FIGURE 3: MY COMPANY WILL ADOPT NEW TRAINING METHODS

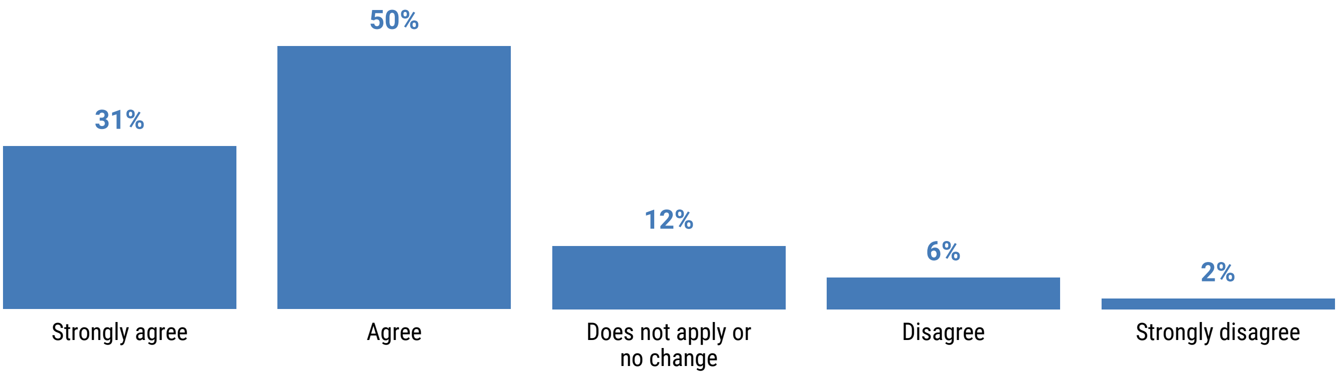


FIGURE 4: MY COMPANY'S BLEND OF TRAINING DELIVERY METHODS WILL CHANGE

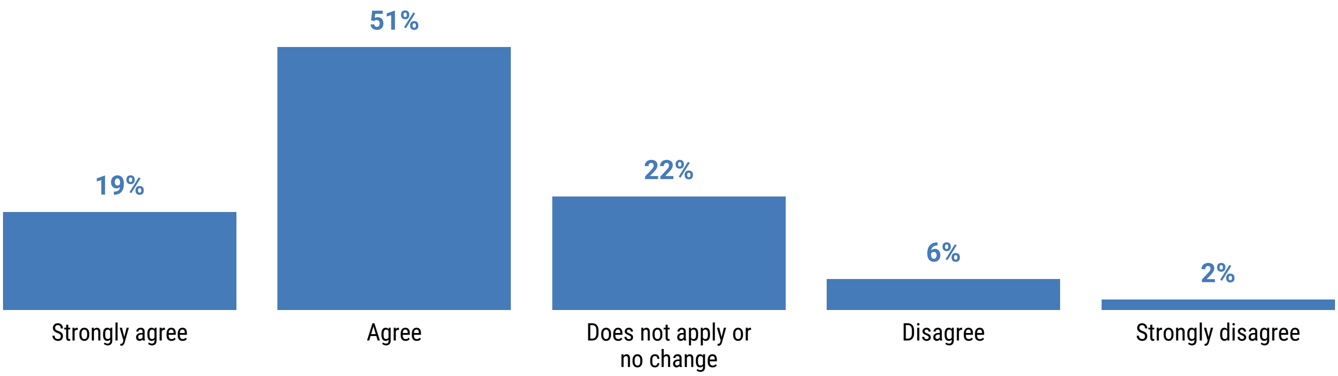
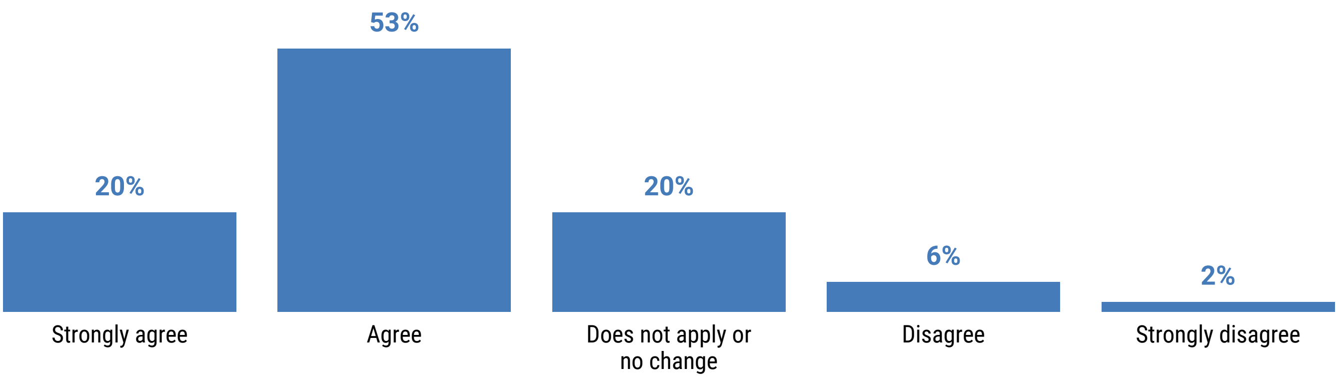


FIGURE 5: MY COMPANY WILL BE LOOKING TO DEVELOP MORE CUSTOM CONTENT



new physician leaders to be comfortable in their role and begin to make impactful decisions."

Organizations, now under immense pressures, cannot afford the delay in leadership autonomy and the workplace inefficiencies that come from physician leaders not being proficient and ready to lead. There is growing recognition that even when new leaders are onboarded properly (within their first 90-120 days), problems can still arise when they start working on large departmental/organizational initiatives with new colleagues facing unfamiliar cultural norms, beliefs and expectations. Regardless of when this "waiting period" or period of being less than competent hits, it can have a negative impact on morale, employee recruitment and retention, as well as the bottom line.

Gail Corkendale, in her 2008 Harvard Business Review article "Overcoming Imposter Syndrome," speaks of many individuals experiencing feelings of inadequacy despite their many career points that mark or evidence success. She states that high-achieving and highly successful people who experience imposter syndrome suffer feelings of self-doubt and a sense of intellectual fraudulence after taking on new roles that require different skill sets. Gail Gazelle, an assistant professor at Harvard Medical School, said that physicians are particularly susceptible to this type of thinking as a result of their early years of training, which focuses on "deficits, not strengths."

Physician leaders, while they may be hesitant to admit their inexperience and lack of needed skills, can benefit from targeted development to unravel the imposter syndrome cycle. Imposter syndrome for physicians is built on a foundation of thought that is hyper-focused on what they are not doing well and a belief that everyone else has mastered the knowledge but them, according to Gazelle. Participation in leadership development programs helps them break the cycle by seeing that other leaders (including physicians) share similar gaps in knowledge, that there are resources to close those gaps, and, like with residencies and fellowships for their clinical skills, they can gain familiarity with the new types of scenarios they will be encountering within a safe space.

Breaking the Poor Leadership Cycle

Another reason to engage physicians in leadership development activities is that studies have shown that ineffective leaders tend to pass along their bad habits to their direct reports through role-modeling behaviors. Leaders, more through their actions than their words, define the values, behavioral norms, atmosphere and level of engagement in the teams they lead. This is also seen in the literature regarding the imprint socialization into medicine has on medical students and residents for years to come.

Medical school indoctrination has been associated with negatively impacting certain aspects of a physician's professional development, including idealism, ethics and empathy, all key functions of providing remarkable patient care and leadership. A 2018 article published in the *Journal of Applied Psychology*, "Breaking the Cycle: The Effects of Role Model Performance and Ideal Leadership Self-Concepts on Abusive Supervision Spillover," concluded that new leaders model their behaviors off of the supervisory behaviors of their leaders, even when the behavior is abusive. The article states that the abusive behavior is particularly destructive because it can be infectious.

A growing body of research has demonstrated that individuals who endure abusive behavior at work will eventually behave the same way toward others, seeing it as a part of organizational norms. This means that we would not only have ill-behaved leaders today, but lower-quality leadership pipelines as over time, the cycle of negative actions continues, reinforcing poor performance through future generations of employees. Without effective leadership development programs and succession strategies, it will be increasingly difficult for large and small health care organizations (or any organization) to retain skilled, motivated and productive employees.

The Future of Health Care Leadership

Toby Cosgrove, in the article "Value of Physician Leadership," states that the shift from clinician to leader is a hurdle that requires mental flexibility and fortitude, because unlike within the operating room, when you make a leadership-based decision, you may not truly know the impact until two years later. To master this type of environment, tomorrow's physician leaders will need to be agile learners — individuals who are willing to learn, unlearn and relearn based on a variety of cues within their complex environments.

Agile learners are able to adapt to changing circumstances, experiment with new ideas and approaches, and gather information that allows them to reflect on their performance. The good news is that physicians are highly intelligent, conditioned to facilitate their own learning to transform their knowledge and clinical skill sets, have a strong drive and work ethic, and have a deep affection for the medical profession, according to *The Best Medicine: A Physician's Guide to Effective Leadership*. This combination of attributes makes them the perfect candidates to take on the demanding role of health care leadership. CLO

Patti Adelman is vice president of the Center for Learning and Innovation, the Corporate University for Northwell Health, and the Physician Leadership Institute.

CHATBOTS continued from page 23

sequence; and that all links, images or files will display or open," Kelly said. If you don't have an app developer or mobile learning expert on your team already, consider hiring one as a consultant. The investment may save you time and money in the long run.

Like any good performer, a good chatbot experience sounds effortless and natural. But be sure to build in time for the measurement, iteration and troubleshooting your chatbot needs for a successful debut.

4. Keep it fun.

A text conversation has its own idiom: It's casual, informal and, often, fun. It's heavily supplemented with images and emoji that amplify and illustrate the text. Above all, it tends toward the humorous; it's an unspoken rule that heavy stuff doesn't belong here.

All this may seem obvious, but it's surprising how many stakeholders are disappointed when chatbot content doesn't look and sound just like mandatory web-based training — clip art and all. Your role as a thought leader and trusted adviser will help to level-set expectations and redirect clients who aren't ready to see their content shaken up. And, though legal and marketing review may be inevitable, it's important for those teams to understand that chatbot content simply will not replicate the fine print. Good content is authentic and informal; content that smacks of legalese or hype will cause learners to drop.

Incorporate gamification and competition. These elements can be as simple as recognizing the first five learners to take a quiz or posting a weekly trivia question. No costly prizes are required, either; social learners are happy to share opinions and show off their knowledge for the sheer fun of it. Learners in people-focused roles, such as public relations, sales and marketing, may be especially receptive. Stiller noted, "In the sales world, people are highly motivated to compete with each other, even with no prize. Arguing about the answers in chatbot is the sincerest way of saying 'I learned this.' "

Don't be too wedded to planned content; learners also enjoy hearing from each other. Work in opportunities to collect learners' responses to polls, surveys and other questions, and share the funniest, most creative or most insightful responses as chatbot content. Insights from peers have an authenticity that no HR department or management team can match — and are often some of the best-recalled takeaways.

Chatbots, like any other learning technology, need to create a solution. They need to increase our access to our learners, help learners access information and support them in transferring new skills to the work environment.

Chatbots aren't for everyone — some learners never opt in. But those who do should find someone like Friend A at the other end: the critical friend who's wise, judicious and respectful of everyone's time — but not too serious to share a good meme. CLO

Tiffany Vojnovski is a performance consultant for GP Strategies. She has worked since 2006 as an educator, curriculum designer and coach.

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Inclusion is Practice

Committing to change • BY MICHELLE P. KING

Michelle P. King is director of inclusion at Netflix and author of "The Fix: Overcome the Invisible Barriers That Are Holding Women Back at Work."

When it comes to advancing organizational diversity and inclusion, too often leaders rely on the latest off-the-shelf training program or policy, but these initiatives do little to change employee behavior. Inclusion is practice. Encouraging employees to value each other's differences and collaborate effectively requires changes in their behavior. Solving inequality starts with making employees aware of how their behavior contributes to it. Leaders play a critical role in creating this awareness by calling out employee experiences of sexist behavior, discriminatory jokes or exclusionary behaviors, and then using these moments to encourage both individual and collective learning.

This is a continuous practice. When exclusionary or discriminatory behaviors happen, leaders need to address these instances directly with employees, in the moment. This includes giving employees one-on-one feedback outlining how their behavior marginalizes other employees — whether they intended to or not — and the impacts. This is also an opportunity for employees to identify how they will commit to change. Managers can support their employees in practicing equality by providing continuous one-on-one coaching, mentoring, development and feedback. This includes holding employees accountable for changing their behavior. Making inclusion a practice starts with creating a learning culture.

To tackle inequality head on, we need to create a work environment where employees feel safe to share their identities, discover each other's experiences of inequality, and learn how they contribute to inclusion overall. Men are being asked to join the fight for gender equality, which sometimes requires rethinking how they behave at work. This depends on both a willingness to learn and a work environment that encourages this. When an inequality moment happens, no matter how big or small, it must be viewed as an opportunity to learn. Leaders and employees need to take time out to investigate the causes and identify what can be done differently — the aim is always to learn from these experiences and improve.

It's important to note that not all employees will feel comfortable sharing their experiences or missteps, which is why it is so important for leaders to establish psychological safety by approaching these moments as opportunities to learn rather than to blame. This starts with leaders sharing their own mistakes and lessons learned.

When leaders are willing to learn and try new ways of working, they make it safe for everyone else to do so. For example, when colleagues openly share sexist jokes, dismiss women's contributions or speak over them, it's an opportunity for leaders to take a moment to stop the meeting and point out what is happening. This can be as simple as calling out the behaviors and explaining the impact and what needs to change. Inclusion will only be achieved when employees understand how to put it into practice at work. Transforming the behaviors, norms and cultures in organizations begins with paying attention to the inequality moments, managing them and, more important, learning from them.

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Leaders can also use moments when employees demonstrate inclusionary behaviors to recognize these efforts and encourage all employees to follow suit and make these practices a habit. For example, leaders can start each team meeting by asking every person to share a recent example of how colleagues behaved in a way that was supportive and inclusive. This simple routine encourages collective learning and reminds all employees of what "good" looks like when it comes to equality. This approach will also reduce the inevitable resistance inherent in any change in management process.

When employees don't know why changes are needed or what is being asked of them, it's easy to resist. But when employees understand the difficulties their colleagues face, this makes it harder to disengage from the change efforts and what is being asked of them. Overcoming resistance starts with giving employees opportunities to educate one another about their different identities, viewpoints and experiences of inequality. To create sustainable change, inclusion needs to become a mainstream part of organizational life, which means making it a part of the way work gets done. This is really the whole point of equality: having employees approach their work in a way that values the contributions, needs and interests of everyone equally. CLO