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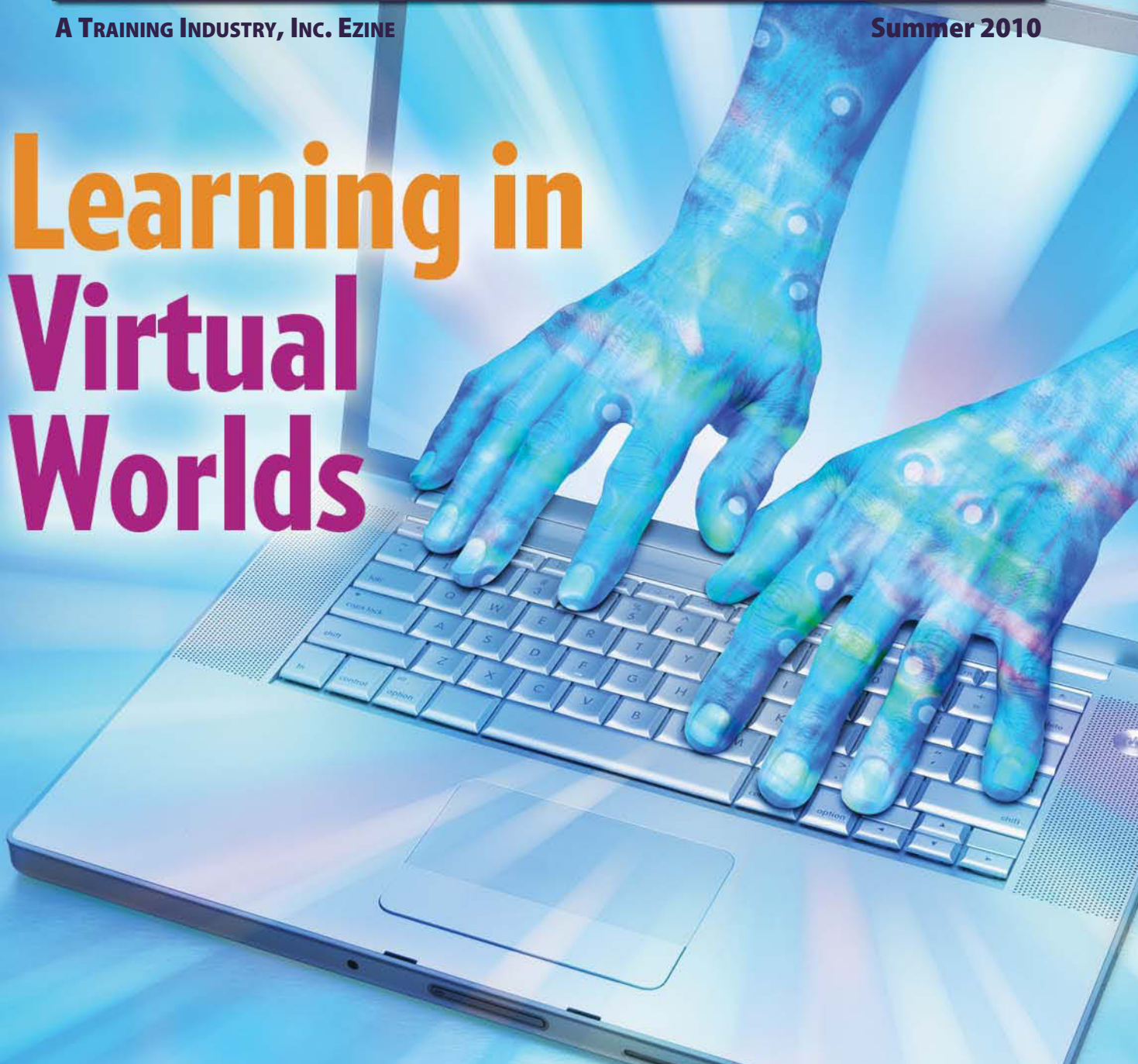
Training Industry

Q U A R T E R L Y

A TRAINING INDUSTRY, INC. EZINE

Summer 2010

Learning in Virtual Worlds

A pair of hands with a blue and green digital pattern, resembling a virtual or augmented reality interface, are shown typing on a laptop keyboard. The hands are positioned over the keyboard, with fingers resting on the keys. The background is a bright blue with light rays emanating from behind the hands, creating a sense of depth and digital space.

■ Moving Beyond Fast-Food Training

■ 10 Mentoring Mistakes (and How to Avoid Them)

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Learning portals, of course, have been around for some time. Early entrants to the market licensed an LMS, configured the front end, assisted with migrating courseware, and left the rest to the client.

The Managed Learning Portal is more about how proprietary and non-proprietary business intelligence is accessed, displayed and mined. Our ability to aggregate information from the cloud, I believe, will revolutionize our industry in the coming decade.

The technology that allows the Managed Learning Portal to pull content from the cloud is critically important, and now available to everyone. That's why the differentiator in this space will be how services and processes are configured to assist the client in making it efficient and effective.

From where I sit, this shift positions training to move into a much more strategic place, but we must seize the opportunity. We must prove that we are not just about providing courses, but about providing intelligence.

Doug Harward is CEO of Training Industry, Inc., and a former learning leader in the high-tech industry. E-mail Doug at dharward@trainingindustry.com.



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WORK IS ACCOMPLISHED BY NETWORKS WITHIN OUR ORGANIZATIONS

LEARNING LESSONS FOR LEADERSHIP

A few weeks ago, I had the pleasure of listening to Peter Senge. The author of *The Fifth Discipline: The Art and Practice of the Learning Organization* gave this powerful message: People, and the networks they build, are essential to learning, and ultimately to sustained organizational success. It's a message explored in the feature articles in this issue.

In his remarks, Senge expressed disappointment in modern organizations and their leaders. Why, he wondered, have they chosen to ignore the obvious? He asked, as did Anne Murray Allen in her "The Nature of Social Collaboration" (*Reflections Journal*, May 2005), why there are there only 20 companies more than 200 years old.

He looked to Ari de Geus's work, *The Living Company*, for his answer: "The long-lived companies see themselves first and foremost as a living human community rather than a machine for producing profit." Of course, profit is necessary in any business, including the business of learning. But without the collaboration of employees, he said, most companies are unlikely to reach their 200th birthday.

Allen's research states that companies that last are based on a "network of collaboration" versus a "network of ambition." According to Senge and his synthesis of Allen's research, "networks of collaboration" build trust and excitement, where knowledge is shared freely and openly—so much so it feels generative, even magical, where no one wants to leave and employees energize each other."

As you read this issue, consider if you are you engaged in a "network of collaboration." Or is your organization experiencing the "network of

This Month's Guest Editor

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ambition"—where fear exists, knowledge is hoarded by a few, the atmosphere feels guarded and political, and employees leave when a better opportunity comes along?

Senge provided an epiphany for some and reaffirmed for others that organizations have always been networked, and work is accomplished by networks within our organizations. There is nothing inherently wrong with a hierarchy, he said, but ineffective hierarchies do not work because they have failed to realize the power of collaboration and networking.

Senge concluded with this challenge: Choose a success in your life. Write down the names of all the employees without whom you would not have succeeded—and go three levels deep. This is your social network, where the work gets done. Then randomly cross off one name and ask yourself if you would have been a success. If the answer is no, you have just realized the importance of your network.

CONGRATULATIONS

Top Training Outsourcing Companies



The Top 20 Training Companies is a service provided by Training Industry, Inc. Due to the diversity of services offered, no attempt is made to rank "Top 20's" or "Watch Lists".

(Note: NIIT & Element K are one corporation but are listed separately resulting in the list of 21 company names)



OPTIMIZING OUR SUCCESS REQUIRES US TO ADJUST OUR ACTIONS

CUSTOMER-SMART SELLING AND SERVICE

Increasing success through more customer-smart selling and service is a continuing, recession-proof business opportunity. Both research and experience indicate that most people demonstrate just 30 percent to 60 percent of those practices that produce successful results. Just last week while conducting a keynote for a large company's sales force, I heard the story of a high-energy competitor salesperson who had great chemistry with those with his same bubbly personality while missing out on sales opportunities to the other three types of personalities. So how can you be more successful?

It begins, of course, with simply practicing the "spirit" of the Golden Rule, stated simply as treating others with respect. However, this isn't adequate, in large part because people do business with us based on how effective we are at both communicating with them and influencing their buying decisions. To be successful we must "treat people the way *they* want to be treated." Since there are four different personality types, our focus with each must be on what motivates them to buy again and again.

Both the sales and service process involves our communications and actions before the customer decides, while deciding and after deciding. Since all sales and service people are naturally either more controlling or relating, optimizing our success requires us to adjust our actions by executing in a disciplined way:

- **Step 1: Focusing, Planning:** A controlling practice by those who naturally are clear about the customer's situation and direct their communications to address their desires or problems.
- **Step 2: Connecting:** A relating practice that results in the customer viewing you as a professional who appears to be genuinely concerned with meeting *their* expectations.
- **Step 3: Exploring, Interacting:** A controlling practice involving probing questions and actively listening in a problem-solving manner in search of solutions that may work best for this customer.
- **Step 4: Collaborating:** A relating practice that seeks mutual agreement on solutions and actions that satisfy the customer's expectations in ways that also work for the providing company.
- **Step 5: Gaining Commitment:** A directing practice of overcoming objections that may occur at this point (or earlier and stronger when the above practices are not executed) by focusing on solutions and non-defensive problem-solving.
- **Step 6: Reassurance, Follow-Through:** A relating practice where the customer's confidence, commitment and loyalty are strengthened by positive experiences, especially when problems occur and are resolved in ways that demonstrate they can trust you.

Follow these principles and practices and adjust your own attitudes and actions along the way. That way, you too will enjoy the benefits of winning through people.

Dr. Michael O'Connor is a recognized thought leader, executive coach and founder of Life Associates, Inc. Michael is the co-author of "The Platinum Rule," "People Smart" and "Customer Smart Selling & Service." E-mail Michael at droconnor@lifeassociatesinc.com.

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AS SOCIAL NETWORKING GROWS, LEARNING LEADERS MAY BE ASKED TO WEIGH IN

SOCIAL NETWORKING AND LEARNING

Optimizing social networking is becoming one of the biggest challenges to overall corporate productivity. Technology now has the ability to become viral before any thought toward process and governance can be introduced. Add to that the fact that many people consider themselves experts in social networking because they have “mastered” Facebook or Twitter. Now you have a recipe for spinning productivity out of control.

As social networking grows, learning leaders may be asked to weigh in on how best to implement the technologies. Let’s discuss the opportunity to embrace social networking technologies, keeping process and governance in mind:

- **Attention Deficit Disorder:** Technology is rolling out much faster than people and companies can master it. There are many technologies that don’t ever see their potential to create value. They are purchased for their shiny bells and whistles, and then they are set aside for the next “shiny” technology.
- **No Consolidated Business Requirements:** It used to be that business requirements were gathered and prioritized, and then technologies were reviewed for a match. With social networking tools, the technology can become attractive to small groups within the company, and then can be rolled out on a larger scale without the gathering of requirements.
- **No Clear Product Definitions:** The definition of where technologies fit is becoming more and more unclear. Even vendors are hesitant to allow themselves to be backed in a corner. This makes it very hard to ensure technologies are productive.

- **No Overall Process:** Without clear requirements and a definition of the intended use of a product, processes (especially cross-functional) become disjointed and productivity suffers. Generally, this will lead to a Business Process Re-engineering Program that is very expensive for the company.
- **No Executive Sponsorship/Ownership:** Since the software requires a nominal fee for a small group, it’s generally unsponsored. With little to no executive accountable to metrics related to the value of a technology, many spin up fast, create havoc and disappear, leaving a wake of destruction (think tornado).

The takeaway from this article should be the awareness of how much time is being invested in technology that is either not optimized or discarded before its value can be realized. I am not suggesting creating huge requirements-gathering projects to get in front of the viral consumption. That would not lead to success, and the learning function would be seen as a roadblock. What I am suggesting is with more awareness of the challenges we are seeing, we can plan better and gain more value from future investment into social networking.

Rick J. Crowley is an active consultant on learning technology and architecture. Prior to that Rick was senior director, learning systems, for NetApp University, a driving force behind Cisco’s e-learning adoption and implementation and held the position of director of technology training for Oracle. E-mail Rick at editor@trainingindustry.com.

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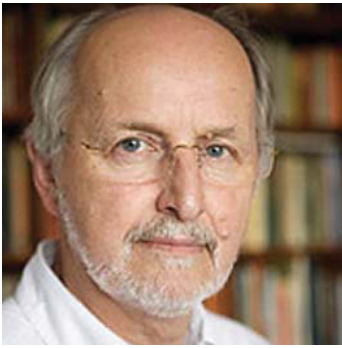
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WE NEED TO LOOK TO MORE EFFECTIVE WAYS TO BUILD WORKFORCE CAPABILITY AND PERFORMANCE

PUSH TO PULL: EXPLORING TRAINING MODELS

Doctor Dolittle's hairy friend, the Pushmi-Pullyu, could never be sure which way it was facing. Both heads were always trying to go in opposite directions.

The world of training and development is currently very like the Pushmi-Pullyu.

Formal, structured learning, designed, developed and delivered by formally qualified instructors in a course or curriculum—the push model of training and learning—still predominates in most organizations.

However, the push approach is creaking under the strain with the demand for faster, faster, faster in a world where change is the norm and where the information ocean is rising and changing at an alarming rate. Push learning simply can't deliver in many situations.

An increasing number of experts believe that the push model of education is past its sell-by date. Davidson and Goldberg, professors at Duke and the University of California, say in their recent publication [“The Future of Learning Institutions in the Digital Age”](#):

“The future of conventional learning institutions is past—it’s over—unless those directing the course of our learning institutions realize, now and urgently, the necessity of fundamental and foundational change.”

The world of training is at the same critical point. The cost and speed (or lack of speed) and the overall ineffectiveness of much of the formal, away-from-the-workplace training delivered by training departments has led me to the conclusion that the future of this age-old model is over as well. We need to look to

more effective ways to build workforce capability and performance.

From Push to Pull

There's a bright side to the coin. We're finding that informal and workplace learning approaches—based on the new world of pull—are proving both more appropriate and more effective channels for learning and workforce performance improvement.

Our understanding of the power of pull is increasing every day. The development of informal and workplace learning approaches such as experiential learning, ePSS, business process guidance, and the use of conversation and sharing through social networks has expanded exponentially in the past few years.

My colleagues in the [Internet Time Alliance](#) have been looking at some wider influences and the development of what we call “workscapes.” Workscapes are the merger of learning and work, where learning becomes part of work and work is learning. These are driven by the individual worker's knowledge and skill needs. As such, they are predominantly pull.

I see workscapes as the future of training. Where pull learning and support is available on-demand, and the push course-based approach is only used where it works.

Charles Jennings is the director of Duntroon Associates, a training & development and human capital consultancy company. Charles is the former chief learning officer for Reuters, where he was responsible for developing 55,000 professionals. E-mail Charles at charles@duntroon.com.

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Learning in Virtual Worlds

BY KARL M. KAPP AND TONY O'DRISCOLL

Over 45 years ago, the Internet was science fiction. Then the Department of Defense commissioned ARPANET to network computers together across the world. By 2006 the Internet was in full operation and “You” became *Time Magazine’s* person of the year because of the developed capability of any Internet connected individual to easily and quickly create and post content to all those networked computers—something not possible on a large scale a mere 10 years ago.

**THIS LEVEL OF
AUTHENTIC LEARNING
CAN PREPARE LEARNERS
FOR AN ACTUAL
EXPERIENCE AND HELP
TO REDUCE THE OVERALL
LEARNING CURVE.**

Today we take for granted inventions like microwave ovens, color televisions and cell phones. Once a technology is around for a few years, people tend to forget what it was like before. You know this is true if you've ever said to yourself, "How did I ever survive without a GPS?" What seemed like science fiction a few decades ago is now reality. The same will happen with 3-D virtual immersive environments—soon you will be saying, "How did I ever collaborate, evaluate data and conduct learning events over distance without 3-D virtual worlds?"

It may be difficult for many in the learning and development profession to imagine a 3-D immersive Internet when so much content and information is still presented in two dimensions. Additionally, early forays into 3-D spaces involved merely reproducing classrooms complete with virtual slideshows, virtual rows of front-facing

WHAT SEEMED LIKE SCIENCE FICTION A FEW DECADES AGO IS NOW REALITY.

desks and avatars sitting quietly at their virtual desks. Early observers of these learning events didn't see any advantage over two-dimensional virtual classrooms. But the problem is not with the technology, the problem was with its implementation. Many early adopters of 3-D virtual immersive environments fell into what Peter Drucker called the "routinization" trap, a phenomenon where existing industries initially apply radically new technology to automate and accelerate age-old processes and methods. This was done when early

filmmakers set up a moving picture camera and merely filmed theatrical plays and was done when a 3-D virtual immersive environment was used to re-create the physical layout of a classroom.

One of the advantages of 3-D VIE is the ability to create an environment that replicates the job performance environment as closely as possible. This level of authentic learning can prepare learners for an actual experience and help to reduce the overall learning curve. In this article, we'll examine one such implementation of a 3-D virtual immersive environment.

Re-Creating the Performance Environment

While conducting research for Learning in 3D, we discovered excellent examples of organizations creating environments in 3-D VIE to closely mimic the actual environment in which the learner must perform. Here is one such example:

Learning to Conduct an Inventory Observation

Ernst and Young is recognized around the world as one of the "big four" accounting firms. As a services organization, E&Y recognizes that the firm's value is most effectively conveyed to clients through the preparedness and professionalism of its people. As a result, E&Y takes training and development very seriously.

As a big-four firm, E&Y welcomes many new recruits each year. Following graduation, there is precious little time to get new hires up to speed on Inventory Observation—a task often assigned to new recruits.



Figure 1: The Orientation Map in Theory Plaza

The Inventory Observation occurs when the E&Y employee travels to a client site and physically counts inventory. To properly prepare for the task, E&Y associates must understand inventory observation theory, jargon and procedures.

Many associates have fond memories of the experience, such as being reminded of a kind mentor who patiently showed them the ropes. Others remember the uncertainty they felt about how to act on site when conducting their first Inventory Observation, despite having done well on all the tests. Either way, it is clear that the Inventory Observation is a rite of passage for most accountants and success or failure in this career can hinge upon how quickly young accountants can turn theory into practice in a way that adds value to the client.

From an efficiency perspective, the cost and logistics associated with conducting physical training sessions for new-hires all over the world is a challenge to execute practically. In fact, one solution E&Y considered was to build a large training facility on the West Coast of the United States to accommodate the anticipated worldwide increase in demand for educating accountants. From a strategic perspective, E&Y was keen to be as green as possible in running their operations, and it was clear that travel associated with training was a challenge in this regard. So, they decided to create a virtual world training experience as a solution.

Since there was already an Inventory Observation instructor-led course, the first task was to create a 3-D virtual immersive environ-

THE COST AND LOGISTICS ASSOCIATED WITH CONDUCTING PHYSICAL TRAINING SESSIONS FOR NEW-HIRES ALL OVER THE WORLD IS A CHALLENGE.

ment. The environment included elements from the instructor-led course with the addition of a virtual factory where learners could conduct an observation in as realistic an environment as possible. The E&Y team worked with external design firm named 2b3d to create the Inventory Observation learning exercise in the 3-D virtual world of Second Life.

The team created the virtual experience so that upon initial ar-

rival, participants were brought to a customized orientation to familiarize them with the 3-D platform. Once orientation was completed, the participants are teleported to a place called Theory Plaza. This was an educational area in front of the production facility named "Grandma's Gourmet Cookies." (See Figure 1, page 16.) In Theory Plaza, participants were exposed to all of the content from the instructor-led materials via video snippets, information kiosks and interactive games.

Upon successful completion of two review tests, and a final knowledge assessment, participants earned approval to conduct the physical inventory itself within the cookie production facility. Upon arrival at the facility, participants were instructed to check in at the front desk to get instructions. (See Figure 2.) Then participants are required to find Plant Manager Parx



Figure 2: Participant Receiving Instructions on How to Begin Inventory Observation Task

who introduces them to their personalized Tour Bot, a non-player character that provides the learner with scripted information. (See Figure 3.)

The Tour Bot leads the learner around the plant, familiarizing them with the various sections of the warehouse. This allowed the student to look around and prepare for their audit observation. Following the tour, the participants meet with the plant manager who asks them to begin their work in the finished goods area.

Participants begin to work to identify tagged boxes, with authentic challenges such as the need to reach boxes via forklift, convert units of measure, determine obsolescence and determine how to inventory water damaged boxes and materials that have been paid for but not yet shipped are introduced (See Figure 4).

Finally, at the end of the inventory observation, participants were required to reconcile a compilation for the inventory observation. For those who made it all the way through the warehouse, the experience provides a place for the application of knowledge and to try their skills in working with others while conducting an audit.

Results

The result was that the learners gained the experience of conducting an inventory observation within the safety of the virtual immersive environment. Mistakes were made, but they were made in a safe context rather than at a client site.

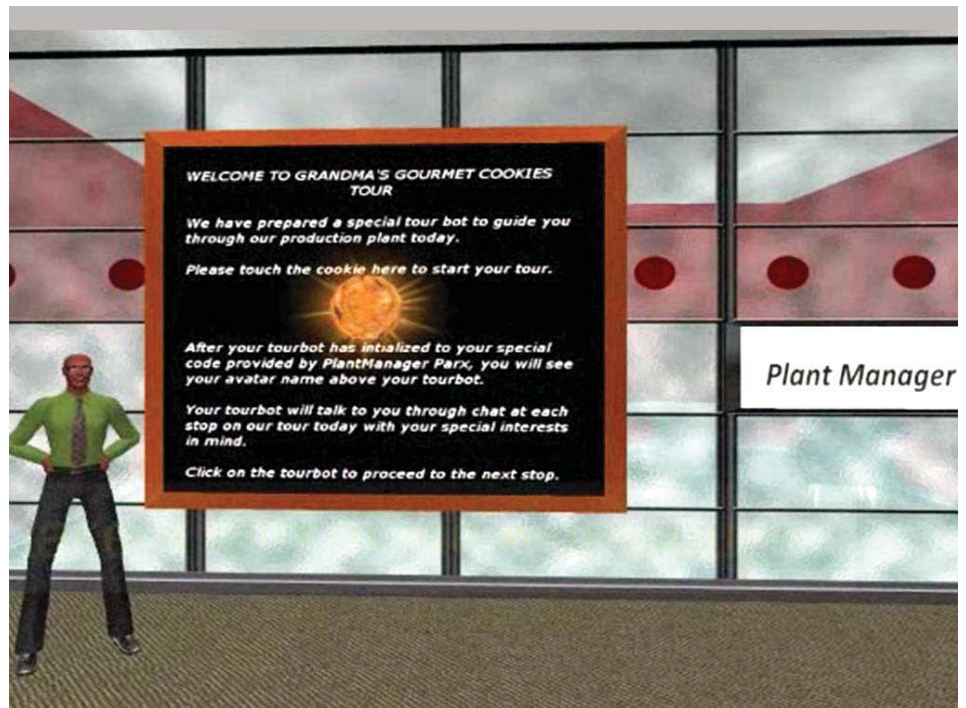


Figure 3. Plant Manager Parx Introduces the Participants to their Personalized Tour Bot

Additionally, a research study comparing the learners within the virtual environment and learners in a more traditional environment indicated that both learning venues

proved effective. The two groups learned an equal amount of information. The cost and time requirements for the virtual immersive environment were less than the



Figure 4. Participants asking Forklift Operator to Access Inventory on Top Shelf

MISTAKES WERE MADE, BUT THEY WERE MADE IN A SAFE CONTEXT RATHER THAN AT A CLIENT SITE.

costs and time for the instructor-led training. A particularly interesting result of the research is that the virtual environment provided a level of realism and immersion not possible with traditional learning methods to such a degree that the learners who went through the virtual audit process were actually less confident in their abilities to conduct an audit than the learners who participated in the traditional training program.

This may seem like the instructor-led training is better because it provided more confident learners at the end of the training. However, we speculate that the real reason is that in a traditional environment where a learner passes tests and demonstrates mastery of knowledge but does not apply that knowledge, confidence levels are artificially high. We've all been to a training and said to ourselves "yeah, I got this" only to be stumped by the first obstacle on

Takeaways

- In the world of technology, today's science fiction becomes tomorrow's business reality.
- Companies like E&Y are leveraging virtual immersive environments to conduct training in topics such as conducting an inventory observation.
- Avoid "routinization" by leveraging the unique affordances of 3-D virtual immersive environments.
- An advantage of 3-D VIE is the ability to create an environment that replicates the job performance environment as closely as possible.
- Virtual immersive environments provide a place where learners can apply learning to realistic situations.

the job. With the 3-D virtual immersive environment, the learners got to apply their knowledge and learned that applying knowledge of conducting an Inventory Observation is a little different than simply understanding how to conduct the observation. The requirements of working in a virtual factory provided better self-understanding and awareness than passing tests asking questions about how to conduct an audit.

Conclusion

As virtual immersive environments move from science fiction to business fact, more organizations will take a cue from E&Y and develop 3-D learning environments to

allow their learners to apply knowledge in a safe environment before heading out to actually perform the tasks for which they are being trained.

Karl Kapp and Tony O'Driscoll are the co-authors of the new book, "Learning in 3D: Adding a New Dimension to Enterprise Learning and Collaboration." Karl and Tony have been studying virtual immersive environments for a number of years. Karl is a professor of instructional technology at Bloomsburg University in Bloomsburg, PA, and Tony is a professor of the practice at Duke University's Fuqua School of Business. Karl and Tony can be reached at editor@trainingindustry.com

Additional Resources

- www.learningin3d.info: Web site to accompany the book, Learning in 3D.
- The blog *The Tech Dimension* at www.trainingindustry.com/blog/authors/karl-kapp is written by Karl Kapp and discusses technology uses in organization for learning and collaboration. He also blogs at *Kapp Notes* at www.karlkapp.blogspot.com.
- Learning in 3D co-author Tony O'Driscoll blogs at his blog, Learning Matters at <http://wadatripp.wordpress.com/>
- The Web site Virtual World News at <http://www.virtualworldsnews.com/> provides information about virtual worlds from a business and learning perspective.



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MENTORING MISTAKES: 10 PROGRAM PITFALLS & HOW TO AVOID THEM



BY BETH N. CARVIN

The corporate landscape is littered with mentoring programs that have died on the vine. Management fails to rally behind the project. Mentors decline to sign on or don't know how to proceed if they do. Ill-matched mentor-mentee relationships evaporate. Program administration becomes overwhelming. Yet all of these problems are avoidable.

If a mentoring initiative fails to take root, it is usually because the HR and training managers responsible for launching and managing the program have never been taught to properly plant and cultivate the seeds. Success or failure can hinge on knowing the likely trouble spots and planning ahead to sidestep them.

Given years of evidence that men-

toring can yield important benefits ranging from fostering employee retention to grooming the next generation of managers, you don't want to doom your program by poor planning. Here are some common mistakes that sabotage mentoring efforts, along with strategies to avoid becoming a casualty.

1 **Failing to build your business case.**

You are unlikely to get executive buy-in for a mentoring program unless you are able to show the potential to the company and its bottom line. A little research will pay off. Ernst & Young's mentoring program for women, for example, saved \$10 million annually (primarily in turnover costs) and increased the percentage of women partners from 5 percent

to 13 percent. A Minnesota hospital that implemented mentoring for newly hired nursing assistants saw turnover plummet from 64 percent to 4 percent in two years. Examples like these can help convince management to back a mentoring project.

2 **Missing an executive champion.**

Sometimes the fate of a mentoring program is sealed by the presence or absence of an executive champion. The right advocate not only helps you secure the financial resources and management support to run the campaign, but also serves as a kind of Pied Piper in convincing mentors to participate. The best candidate for the position is a senior leader with a strong mentor in his

or her past. These people are usually eager to “pay it forward” by promoting mentoring to others in the organization.

3

Not having clear objectives.

Your mentoring objectives will shape the way the program is structured and therefore your ability to produce results. Is your goal to acclimate new hires? Build cross-departmental connections? Blend corporate cultures after a recent acquisition? Support diversity initiatives? Nurture high-potential employees to become your future leaders? The answer will help determine whether mentorships are self-matched or administrator-matched (see #5), formal or informal, goal- or non-goal based, and so on.

4

Poorly executing mentor recruitment.

Willing mentors rarely materialize out of thin air. You need a two-part recruiting plan. First, decide how you're going to recruit. Will senior executives nominate mentors? Will each department be responsible for providing names? Will you ask for

volunteers in management meetings or through corporate communications channels?

Second, be ready to “sell” prospective mentors by providing information on how they can benefit. Executive champions can make a big contribution to the cause. So can resources like “The Ten Best Reasons to Be a Mentor” or materials you develop yourself to wave the mentoring flag.

MENTORSHIPS ARE MORE SUCCESSFUL WHEN THE PROTÉGÉ IS INVOLVED IN SELECTING HIS OR HER CORPORATE COACH.

5

Using the wrong matching methodology.

Developing your strategy for pairing mentors and mentees involves answering two key questions. First, will you match manually or use technology to do the work? Second, will the participants choose their partners (self-matching) or will a mentoring team handle the task (administrator matching)?

Manual matching can work for programs with fewer than 50 mentorships, but it gets too unwieldy and time-consuming for larger programs. The process can take hours or weeks. Automated mentor-mentee matching products shorten the timeline by allowing mentors and mentees to complete online profiles outlining their background, interests and goals. Participants or program managers can then search for matches by specific criteria, zeroing in on compatible twosomes with a click.

The self-matching versus administrator-matching choice is not as clear-cut. While executives clearly need input into initiatives designed to develop high-potential employees, for example, failing to give mentees a voice can backfire. Research has proven that mentorships are more successful when the protégé is involved in selecting his or her corporate coach. One solution is to ask for the mentee's top three mentor choices and try to pick from that pool, making it a collaborative decision rather than a forced assignment.

Resources

- **How to Start a Corporate Mentoring Program** by Beth N. Carvin
- **Is Mentoring Worth the Money: A Benefit-Cost Analysis and 5-year Rate of Return** by A. Villar and M. Strong, University of California, Santa Cruz
- **The Mentor News.** Published by Peer Resources. E-Newsletter with information about emerging trends, critical issues, and essential resources to persons involved as leaders and participants in all forms of mentoring.
- **Catalyst Inc.** A nonprofit organization working globally to build inclusive workplaces and expand opportunities for women and business, with a strong research and knowledge base on mentoring.

6 Neglecting to establish and enforce rules.

Even the least formal mentoring programs need a few rules. If you are using a self-matching process enabling mentees to request mentors, for example, one rule might be that mentors must respond to the request within two weeks. If mentees are signing up for your program voluntarily rather than being handpicked, you might decide that they must select a potential mentor within two months or be disqualified.

Other rules might address issues such as length of mentorship and required number of mentor-mentee meetings. You don't need to write a book, but you should provide basic guidelines and expectations.

7 Leaving participants without a roadmap.

Frequently mentorships get stalled at the starting gate because participants don't know how to get where they're going. You should be providing materials you've prepared (activity suggestions, goal-setting forms, tips), online resources (links to relevant information) and hands-on support (training sessions, webinars) to jump-start the relationship. Refrain from overloading your mentors and their protégés with reading material and meetings, but help them by lighting the fuse. They will take it from there.

8 Letting the energy fizzle.

Many programs lose momentum because they lose visibility. You need to use e-mail, newsletters and other communication channels to sustain the buzz. Tell mentorship success stories from your organization. Survey participants and report

the results. Share new mentoring research or interesting items you encounter in your reading. Ask participants to refer colleagues to the program if there is open enrollment. And always include a plug for your program.

MANY PROGRAMS LOSE MOMENTUM BECAUSE THEY LOSE VISIBILITY.

9 Neglecting to crunch the numbers.

Tracking and measuring your program progress is critical. You should be monitoring the proportion of mentors to mentees, the demographic composition of each group, the number of mentorships formed as well as dissolved, mentees' needs versus mentors' strengths, and much more. This will not only provide feedback to your executive champion and corporate management, but it guides you in refining your program.

If the majority of your mentees want assistance with strategic planning and only a few of your mentors have that skill, for example, you will know where to focus future mentor recruiting efforts. Over the long

term, you can even compare retention and promotion of program participants to other employees to determine your return on investment.

10 Failing to automate where possible.

Manual program administration can become too burdensome, particularly with larger mentorship numbers. We have already talked about leveraging technology to provide self-service mentor-mentee matching, dramatically reducing the time required to pair people with common goals and interests. The same products typically also track program progress, generate reports, provide space to house program documents, and send surveys or broadcast e-mail to participants—usually through an online interface. You'll spend less time managing your program—and more watching it thrive.

Beth N. Carvin is the CEO and President of Nobscot Corporation, a global technology firm specializing in key areas of employee retention and development. Nobscot's MentorScout division is located at <http://www.mentorscout.com>. Email Beth at editor@trainingindustry.com.

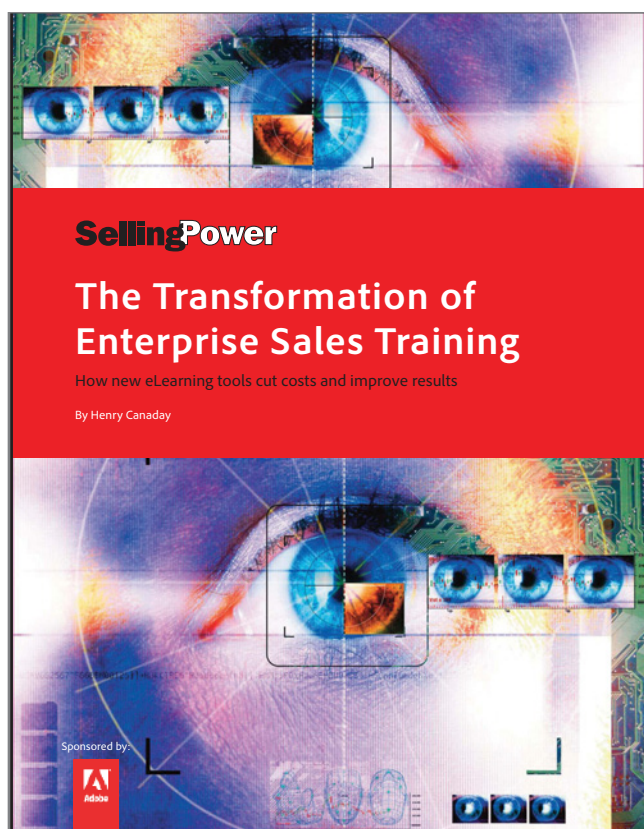
Takeaways

- Find an internal champion to help promote the mentoring program.
- Provide a roadmap for mentors and mentees to follow.
- Keep the energy level high by sharing success stories.
- Monitor and provide results to your executive champion.
- Utilize mentoring technology to ease matching and administration as your program grows.

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THE NEXT GENERATION OF CORPORATE UNIVERSITIES



BY MARK ALLEN, P.H.D.

At a recent gathering of training industry professionals, one manager complained that her client wanted to take a face-to-face, two-day training program and convert it for virtual delivery. She lamented the loss of quality she expected, the call to compromise

her values and her concern that she might be “selling out” if she surrendered to the pressure to redesign this program.

Although corporate universities have been around since the 1940s, the real proliferation came in the 1980s and 1990s. During those de-

acades, many corporate universities got their start as training departments that at some point promoted themselves into corporate universities. Over the past 10 years, corporate universities have expanded into more strategic entities. The coming decade portends to have corporate

THERE ARE BOTH GREAT BENEFITS AND SIGNIFICANT CHALLENGES TO A GLOBAL CORPORATE UNIVERSITY.

universities achieve greater sophistication and take on much more prominent roles in the success of their parent organizations. This expanded reach and impact will cut across three strategic areas: globalization, evaluation, and technology. This article will explore the ways corporate universities can contribute in these areas. The article concludes with a discussion of the strategic impact of corporate universities on organizational success.

Globalization

While the corporate university movement started in the United States, it is no longer strictly an American phenomenon. Sizable and impactful corporate universities have spread throughout Europe. China and other Asian nations have embraced the concept, and corporate universities have been appearing in Australia, South America and Africa. The Global Council of Corporate Universities is a worldwide consortium of corporate universities that boasts board members from the United States, Canada, Argentina, France, Spain, Switzerland, Russia, the United Arab Emirates, China, Singapore, India, Australia and South Africa. It is clear that corporate universities will continue to



spread throughout the world.

Beyond the expansion of corporate universities to organizations in many different countries, we will see a continuation of the expanded reach of corporate universities in multinational corporations. Rather than trying to bring executives to corporate headquarters for training and development, corporate universities have been opening branches throughout the world. Motorola University has long had a presence in China, and McDonald's Hamburger University recently opened a branch in China, the seventh country with a branch of the university.

There are both great benefits and significant challenges to a global corporate university. The benefits include consistency in culture, systems, strategies, values and even a common language. The challenges include language, travel, technology platforms and differences in cultural concepts regarding the nature of management and leadership.

Evaluation

Evaluating the success of corporate universities has been an ongoing challenge ever since the genesis of corporate universities, or at least since Don Kirkpatrick first bestowed upon us a model that showed us that we had four levels in which it was difficult to measure. In this era of diminishing resources and greater accountability, it is no longer sufficient for chief learning officers to assert that they know the university is contributing—they need to demonstrate the extent and even the quantitative value of their contributions.

Being able to measure and quantify is rapidly evolving from a nice thing to have into a must-have. The key to evaluation is not the reliance on measuring everything that moves—it is figuring what is most important and then accurately measuring that.

The advantage to accurate measurement is not only greater accountability and the ability to demonstrate a return on what is sometimes a substantial investment—better metrics bring clearer focus and actually drive better performance.

The University of Farmers at Farmers Insurance Group uses Kirkpatrick's four levels as its basic

BETTER METRICS BRING CLEARER FOCUS AND ACTUALLY DRIVE BETTER PERFORMANCE.

model. However, the focus of the measurements is on level four evaluation. Everything the university does is evaluated based on how the offerings of the University are contributing to overall success of Farmers. The University has developed some sophisticated methods for measuring how its training and development efforts directly contribute to sales, claims accuracy, customer service and other important organizational metrics of success. The key to success of the University of Farmers' measurements is that the focus is not on learning itself, but on the organization's specific business objectives.

The key to success in measurement and evaluation is to emphasize metrics that have a sharp focus on the mission of the university or directly relate to the strategy of the parent organization. In order to do this, there needs to be a clear vision in advance about what the corporate university is trying to accomplish. By starting with clearly articulated goals and objectives about specific organizational outcomes, you can not only focus measurement around these outcomes, but the training itself is likely to be more focused. Thus by knowing in advance what you are



trying to achieve and what you are going to measure, you are not only more likely to be able to successfully evaluate, you are also more likely to achieve the desired result.

The next decade is likely to see a shift away from the measure-everything tactic and toward an approach that focuses on more strategic, revealing metrics. We will see much better measures of success for corporate universities and their programs. And these measurements will not necessarily be more complicated, expensive or time-consuming than much of what is currently in place.

Technology

Chief learning officers spend a great deal of their time working on issues relating to technology. They wrestle with trying to figure out what percentage of their offerings should be technology-enabled. They sort through vendors to select appropriate platforms. They wrestle with financial statements to

figure out how much money they can save on travel and instructors with technology.

The real emphasis, of course, should be on learning. Far too many discussions of e-learning are completely about the “e” and not at all about the learning. And far too many e-learning “solutions” have done a great job of saving money, but have not enabled learning at all because people were either disengaged or did not even bother to finish. You can save money with e-learning, but it's not cost-effective if it's not effective. This is where measurement and evaluation once again come in. If you have a clear picture of what you are trying to accomplish and of how to measure it, you will know whether technology is helping.

The mission of a corporate university is to enable learning, not to save money. Every technology solution must be evaluated based on whether it enhances learning, not on the number of dollars it saves or the number of bodies it can reach.

My bold prediction for the next decade is that as technology evolves and becomes more powerful, we will see fewer e-learning programs. The pendulum has been swinging from virtual corporate universities

CORPORATE UNIVERSITIES ARE NO LONGER RELYING ON TRAINING AS THE ONLY TOOL FOR DEVELOPING PEOPLE.

with no live classes toward more and more instructor-led classes for most of the past decade. Perhaps it is beginning to settle in the middle ground of blended learning in which technology is used in combination with classroom learning. Chief learning officers have had their share of failed e-learning efforts. Chief learning officers are nothing if not great learners, and many have learned from their e-learning mistakes. This will lead to better, smarter uses of technology. This is not to say that technology doesn't work or is dead—merely that we as an industry have misused it and made many mistakes in the past. Over the next decade we will see much more efficient and creative uses of technology in ways that will truly enhance learning.

Strategic Impact

The *Corporate University Handbook* defines a corporate university as, “an educational entity that is a strategic tool designed to assist its parent organization in achieving its mission by conducting activities that cultivate individual and organizational learning, knowledge, and wisdom” (Allen, 2002, p. 9)

The most important word in this definition is “strategic.” The



key difference between a corporate university and a training department is that corporate universities are strategic entities tied directly to organizational mission. The key

to being strategic is developing people in ways that clearly impact organizational performance. Corporate universities are no longer relying on training as the only tool for developing people. While training is and always has been an important weapon in our development arsenal, there are so many other ways to develop people and advance organizational capabilities that can provide immense strategic leverage. Table 1 offers a list of the

Table 1: Corporate University Functions

Needs assessments	Strategic hiring
Design training programs	New employee orientation
Deliver training programs	Succession planning
Design managerial/executive development programs	Culture change
Deliver managerial/executive development programs	Strategic change
Assess technology options	University partnerships
Deliver e-learning or blended learning programs	Foster an ethical environment
Hire vendors	Corporate social responsibility
Manage vendor relationships	Career planning
Market programs internally	Mentoring
Market programs externally	Executive coaching
Brand the corporate university	Research and development
Evaluate programs	Library
Evaluate the corporate university	Heritage center
	Performance management
	Knowledge management
	Wisdom management

Adapted from *The Next Generation of Corporate Universities* (2007)

numerous responsibilities of corporate universities and the different techniques they use to develop people and enhance organizational capabilities.

The next decade will see a much clearer focus on mission-critical, strategic roles for corporate universities. Great organizations will thrive because of their corporate universities, and corporate universities will receive the credit they deserve for organizational success. Chief learning officers will have the same status and prestige as the other chiefs. In short, a great corporate university will be the difference maker in distinguishing between great organizations and ordinary ones.

Mark Allen, Ph.D. is the editor and co-author of The Corporate University Handbook and The Next Generation of Corporate Universities. He has written extensively about corporate universities, spoken about the topic all over the world, and consulted to numerous corporate universities. He is on the Board of Advisors for the Global Council of Corporate Universities and the Board of Regents for the University of Farmers. He is a full-time faculty member at Pepperdine University's Graziadio School of Business and Management. He may be reached at editor@trainingindustry.com

Takeaways

A successful corporate university is a strategic lever that helps its parent organization achieve its mission. Over the next decade the most successful corporate universities will:

- Be global. They will help their organizations thrive all over the world and will help address the challenges of being globally dispersed and culturally diverse.
- Measure in relevant and creative ways. They will be able to measure what is truly important and be able to demonstrate their value.
- Use technology wisely to enhance learning, not just as a means of saving money.
- Be strategic partners that develop people in new and creative ways that enhance organizational capabilities.

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BUSINESS ALIGNMENT: BEYOND FAST-FOOD TRAINING



BY NICOLE SMACK

No one ever intends to find themselves in the position where their learning department becomes a catch-all for shifting, often random learning requests. No learning professional wakes up saying, “I’d like to take on work with no measurable impact on our organization that will be outdated by the time the training is launched.” So, how does it happen for so many well-intentioned learning experts?

For many organizations, training departments become a catch-all for anything that SMEs and leaders believe is “educational.” If someone “needs to know about it,” training is called upon to execute against it. In many instances, we end up taking on work that could be accomplished through

other channels such as communications, manager coaching, or SME-driven updates to target audiences.

To complicate matters, learning experts often find themselves “taking orders” from the

wrong people, causing a misalignment between training courses that expend valuable time and resources and the development of solutions that will have a business impact. And with a desire to be viewed as “good partners,” learning professionals often say “yes” to the wrong kind of projects. This further challenges their ability to work on business-impactful projects. Within

this problem lies the solution: Learning solutions must be aligned to senior leaders’ goals and objectives.

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THE SENIOR-MOST LEARNING PROFESSIONAL ON YOUR TEAM MUST BECOME AN ADVOCATE FOR CHANGE.

There are many interdependent components to consider when working to evolve your department from one that accepts buffet-style requests to one that is aligned to strategic organizational needs. Here are three to get you started.

First, identify senior leaders who will champion your cause. The senior-most learning professional on your team must become an advocate for change and align with leaders who will champion the evolution of your learning organization. The use of data to show how the programs you are working on are or aren't impacting organizational objectives is critical when advocating a need to change. Executives have a fiscal responsibility. If you can show them data indicating the direct and indirect spend on learning programs and question how that spend is adding value to their business, you are likely to wake up the executive that hasn't been paying attention. While it is a calculated risk, demonstrating your concern over spend that may not

contribute to strategic goals makes it clear that you are willing to address your side of the responsibility and appeal for their equal response. Building a groundswell of senior advocates for this type of transformation is critical to moving your organization beyond the a-la-carte approach to learning.

Next, take a look at your scoping process. Many organizations are under constant pressure to produce learning because it "feels right" to respond to the business by completing as many training courses as possible. As a result, over time, the scoping of a project and associated needs analysis ends up being focused in the wrong areas. Ask yourself a series of questions:

- Am I focused on how this request is driving forward business goals?
- How is this initiative strategically aligned to what our leaders are seeking to do to advance their organizations?
- Are we focused on uncovering metrics to determine the initiative's success so that there is an

opportunity to align learning to those metrics?

- Are we focusing our questions on all of the factors that affect performance beyond the learning so that training doesn't end up holding the bag for the success of the business initiative?
- What questions are we asking to uncover the performance expectations for employees who need to do something new or different as a result of this initiative?

In many instances, learning professionals over-focus on what kind of training people want, furthering the "order-taking" approach. Walking away from an initial conversation with a business partner with a simple understanding of their task, the content and the medium they prefer may allow you to whip out a quick program, but it will never result in moving your organization to one that is focused on extending the capability of employees.

Finally, develop a learning governance function to ensure that your department remains a credible and

Resources

- **Learning Governance: How to Cut Training Costs without Crippling Your Learning & Development Efforts** — written for Razor Learning – Rob Pannoni & Grant Ricketts
- **The First 100 Days: Getting Started as a Learning Leader** — Written for TrainingIndustry.com – Vince Eugenio & Gary Jusela
- **Achieving Business Alignment: Linking Learning to Performance** — TrainingIndustry Webinars

THE TRAINING TEAM SHOULD BE PROJECT 'NEUTRAL' WHEN IT COMES TO WHICH PROGRAMS THE COMPANY SHOULD INVEST IN.



valuable asset. By including senior decision-makers, senior advisors and senior learning professionals, your learning governance function will be able to ensure that the resources invested in driving the agenda for learning are tied to the strategic needs of the business as determined by the leaders in the company, not field subject matter experts or worse, the training organization. Learning teams often find themselves in the difficult position of trying to determine priority and capacity to manage through a myriad of requests.

Therein lies the problem: the training team should be “project neutral” when it comes to which programs the company should invest in. The responsibility of the learning professional is to complete an effective “business scope” of the project that allows the executives to determine if the request is a valid and worthwhile investment. It is our role to share the risks associated with proceeding with a project with ill-defined metrics or indefinable ties to organizational goals just as it is equally our role to communicate which projects do include these areas of alignment. It’s also our job to communicate post-launch results so the executives may see the business impact of a well-aligned initiative and its learning solution. And

in the cases where an executive approved a misaligned initiative that lacked measurable performance factors, governance provides a forum to review that decision.

At the end of the day, learning governance ensures that business leaders are aware of and in agreement with the programs they are investing in. Over time, you can use this forum to drive greater strategic alignment by guiding your executives to focus on their strategic goals first and allow the learning needs of the organization to evolve from there. But you must start somewhere. Your department is most at risk when business leaders do not know what you are working on, do not see its value to the organization and do not agree as a collective team as to the direction for learning.

You cannot simply flip the switch and get out of the fast-food training business. It takes time, a willingness to pick your battles and in many cases years of evolution to transform your department to a place that is indisputably seen as a partner to the business and not an internal vendor. If you can begin by making the mental move and forever throwing away your order-taking pad and pen, you will be on the path to creating a function within your organization that is both valuable to the business and significantly more

Takeaways

Align your learning department to your business starting with:

- Identification of a senior “champion” *within the business* who can partner to promote the cause for learning’s transition to a business partner.
- Ensuring your scoping process is focused on all factors that affect the performance of employees and drives business results, not an a la carte request for training courses.
- Developing a learning governance function where executives take accountability to drive the agenda for learning aligned to business goals.

rewarding for your team members.

Nicole Smack is the Director of Learning Business Partnerships for Iron Mountain Inc., responsible for leading a senior team of Learning Business Partners and heading up their Learning & Development Governance function to align learning with the business. Prior to her current 10-year tenure at Iron Mountain, Nicole worked for Infiniti East, the Corporate Luxury division of Nissan. Email Nicole at editor@trainingindustry.com.

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Jiffy Lube University: Oiling the Engine of Business

“I could not be more a part of the business if I sat in an office next to the president.”

Ken Barber,
Jiffy Lube University



BY TIM SOSBE

You know what a typical service garage looks like, right? Everything looks at least a little dirty, there's a sheen of oil on any surface you might accidentally brush against, there are tires and assorted auto parts stacked haphazardly everywhere, except around that incredibly politically incorrect calendar, showing someone's barely dressed daughter holding power tools in ways the manufacturer never intended. The men who work there—yes, it's just men—look grimy, unapproachable and a little too busy for people like you.

Right? Wrong. Very, very wrong.

You might still find a dinosaur garage like that, but as you drive into today's new breed of quick-service garages, places exemplified by the Jiffy Lube franchise stores, you'll find a much more modern environment.

A service technician will smile as he—or she—greets you warmly. A technician will drive your vehicle into the bay then go over service options with you, and you can enjoy a nice beverage as you wait in a clean, comfortable lobby. As the team works over your car, checking off the 18 points of Jiffy Lube's Signature Service Oil Change, you'll be consulted as needed and you'll be thanked warmly before driving away.

That level of automotive service doesn't just happen in an industry plagued by a hundred years of bad public relations. It's the result of training, culture creation and a lot of hard work, taking place from the pit below the auto bay all the way to the big corner office on the highest floor of the headquarters building.

At Jiffy Lube, the learning team has taken that culture creation very seriously, and they've seen some seriously good results from their work. Three years ago, the company, a subsidiary of Shell Oil Company, began to overhaul its organizational training and pull things together under a new corporate university brand, Jiffy Lube University. Since then, the training has taken shape, with 2010 turning into a banner year, as Jiffy Lube University was honored with awards from Corporate University Xchange and named the 50th best training provider in Training magazine's Top 125 competition.

"Now everyone speaks about Jiffy Lube University as if it had been there for 20 years, not three years," said Ken Barber, a manager of learning & development for Shell who oversees the Jiffy Lube training. "They speak about training with great pride. It's put us in a position where our funding is secure and our support is incredible. They've said, 'You guys keep doing what you're doing.' It's opened up lots of opportunities to continue to have the support we need and to continue to move forward on our journey."

Barber has been in his leadership role at Jiffy Lube for four years now, but his roots in the quick-lube industry go back deeper, to a former position with Texaco. He'd actually left that company for another position, but joined Shell in July 2006 to work with the Jiffy Lube teams.

And a big team it is. Jiffy Lube itself has just about 130 employees, but with more than 2,000 franchise stores across the United States and Canada, and each store having an average of 10 employees, Barber and his team are responsible for more than 20,000 learners. What's at stake here? The service needs of an amazing 24 million customers annually.

"For any franchise to perform anything 24 million times and to do it consistently, accurately



and to the satisfaction of the customer requires you have a very precise approach," Barber said. "When turnover is always an issue and consistency is always a challenge, you need to have a program to guide people through that process."

So, once he took his new position, Barber's first mission was to begin to create the right culture of training, aligning that culture around three principles he found so compelling they were included in the Jiffy Lube University logo: Integrity, Excellence and Innovation.

"I felt if we committed to those

three things, we would accomplish great things," Barber said.

They're definitely on their way. Moving to a blended learning model, Barber's learning team has launched a series of Web-based training courses, largely replacing most in-person training, except for some higher-level courses aimed at managers and franchise owners. Jiffy Lube University now has an online library of more than 50 computer-based training course and seven instructor-led courses. Last year, Jiffy Lube learners completed more than 245,000 courses in about 758,000 hours of learning.

"We could never do that face-to-face," Barber said. "That's why our blended learning model we feel is the appropriate model for the system."

Naturally, that work didn't happen by itself. Jiffy Lube worked closely with The Bob Pike Group to establish a creative adult learning approach, and their online courses were designed by InterCom, a Houston-based company. The third piece of the transformation puzzle was investing in a learning management system from Adayana.

The partnerships didn't just happen with external companies. Internally, Barber works with two separate groups to keep things on track. The Jiffy Lube leadership team works closely with learning to stay informed, involved and supporting. There's also a Jiffy Lube

Association of Franchisees, which operates a training committee made up of eight franchisees, two Jiffy Lube International leadership representatives and two members of Jiffy Lube University's learning team. In monthly meetings, they ensure priorities are in place, content is reviewed and vetted, and opportunities are extended.

"Had that not been in place, had it not worked the way it does, we could be running into roadblocks every day of the week," Barber said. "There are challenges, but this one governance body has made a huge difference in reducing or eliminating the challenge."

That leadership support also helps, especially with a fairly small team of eight learning professionals. Fortunately, Barber said, learning is well-received and well-supported at Jiffy Lube.

"I could not be more a part of this business if I set in an office next to the president," Barber said. "We're integrated in the decisions the business makes. We're not an afterthought. They want to get the timelines set based on when we can make the training available."

A case in point on acceptance and alignment came with the recent re-launch of Jiffy Lube's 18-point Signature Service Oil Change. To support the Jiffy Lube brand, the company planned a massive marketing effort, but first the stores had to be ready for the rush. Training was rolled out, with a goal of reaching 80 percent of store employees. In a short while, Jiffy Lube University delivered training to 85 percent of the employees.

"It blows me away that anything could penetrate that far that fast and make that big a difference," Barber said. "It just proved we could do anything if we set our minds to it and everyone gets behind it."

That kind of teamwork—the kind that boasts of integrity, excellence and innovation—makes Jiffy Lube more than a job for Barber.

"I've worked for quite a few years with great companies," he said, "but I've never had a job that was more fun and where been able to accomplish more and had more support than the place I find myself today."

Tim Sosbe is editor of Training Industry Quarterly ezine and general manager of webinars for Training Industry Inc. You can e-mail Tim at tsosbe@trainingindustry.com.

ABOUT ...

Ken Barber



Title/Company: Manager Learning & Development, Shell Oil Company/Jiffy Lube International

How Long Have You Been in Your Current Post? 4 years

College/Education: Auburn University B.S. Business Adm

Leisure Activities: Watching Sports, Reading, Biking, Family Activities

What's Your Favorite Social App? LinkedIn, although I don't do a lot of that. Email I guess is my favorite.

What Are Your Top Focus Areas? Team building around our Standards of Integrity, Excellence & Innovation

How Do You Measure Your Team's Effectiveness? Certification Percentage, Student Evaluations, External Awards, Internal Support

Size of L&D Budget? The budget has maintained and even increased during the tough economic times of the past couple of years. So we've not backed away from our training commitment.

Number of People on L&D Team? 8

Who is Your Professional Role Model? Tamar Elkeles, CLO for Qualcomm

What's the Most Recent Business Book You've Read? "Outliers" by Malcolm Gladwell

Any Words of Inspiration for Future Training Leaders? Find something you believe in, commit yourself to it, and never give up trying to make it happen.

If I Weren't in Learning, I'd... Be in the business. I see close parallels to both and neither can function independently of the other.



F O C A L P O I N T

LEVERAGING EXTERNAL PROVIDERS

BY TRACY HOLLISTER

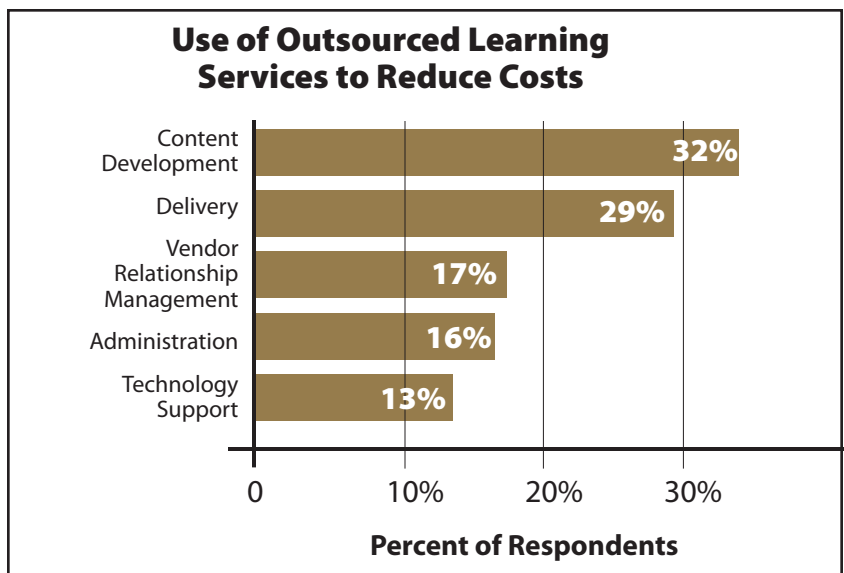
Since nearly all corporate learning and development groups outsource *at least some* learning services, they do not need to know *whether* to outsource, but *what* to source externally and *how* to select the right partners. To inform outsourcing decisions, this article highlights the collective wisdom of learning professionals from four studies on what they outsource most and what they value most in external providers.

What Is Outsourced Most

One way to understand what is outsourced most is to look at the areas in which learning groups use external providers *to reduce costs*—one of a few leading drivers for outsourcing decisions. Among five major categories of services listed in Figure 1, the two areas where learning professionals most often use external providers are content development and delivery.

Outsourcing for both content development and delivery can be attractive, because both services are often project- or course-specific. For courses that are not offered on an ongoing or widespread basis, it may be more cost-effective to “borrow” the necessary subject-matter expertise of external providers rather

Figure 1



Source: Training Industry, Inc., 2010

than “buy” it through permanent hires.

What types of content get outsourced most often? One study on continuous improvement (CI) training suggests that training for *advanced* skills is outsourced much more often (by 29 percent of respondents) than *basic* skills or awareness training (by only 5 percent of respondents). The study also found that 28 percent of respondents use providers for training on leading/managing in a continuous improvement environment. Both advanced skills and leading/managing in a

continuous improvement company are complex topics that require sophisticated expertise. This expertise may be more likely to come from external providers who have had the chance to deepen their expertise and to widen their perspective on the same topics through a variety of client engagements.

What do companies most value in external providers? A few studies reveal three key attributes:

- 1. Strategic Alignment:** By far, the most-often-cited reason why hundreds of study participants say a learning provider is effective is that they design training or other solutions that meet their clients' business needs. Learning professionals want to work with providers who can consult with them, listen to them, uncover their true needs and then present solutions that address those needs.
- 2. Experience:** As Figure 2 shows, experience is paramount in selecting providers. When learning

professionals choose providers to assist them in the challenging work of making the necessary behavior and process changes for successful continuous improvement initiatives, they rely on experience in three areas: in training, in their industry and in consulting. This experience enables a provider to offer in-depth, high-quality and well-researched content and to have the ability to customize that content based on client needs. In addition to valuing provider experience, study participants also demand subject-matter expertise—as well as proficiency in facilitating learning—in the providers' instructors. As Figure 2 also illustrates, learning professionals appreciate experience with different delivery technologies, as they view as important their ability to reach all locations with a variety of methods.

- 3. Flexibility:** One major reason why learning professionals con-

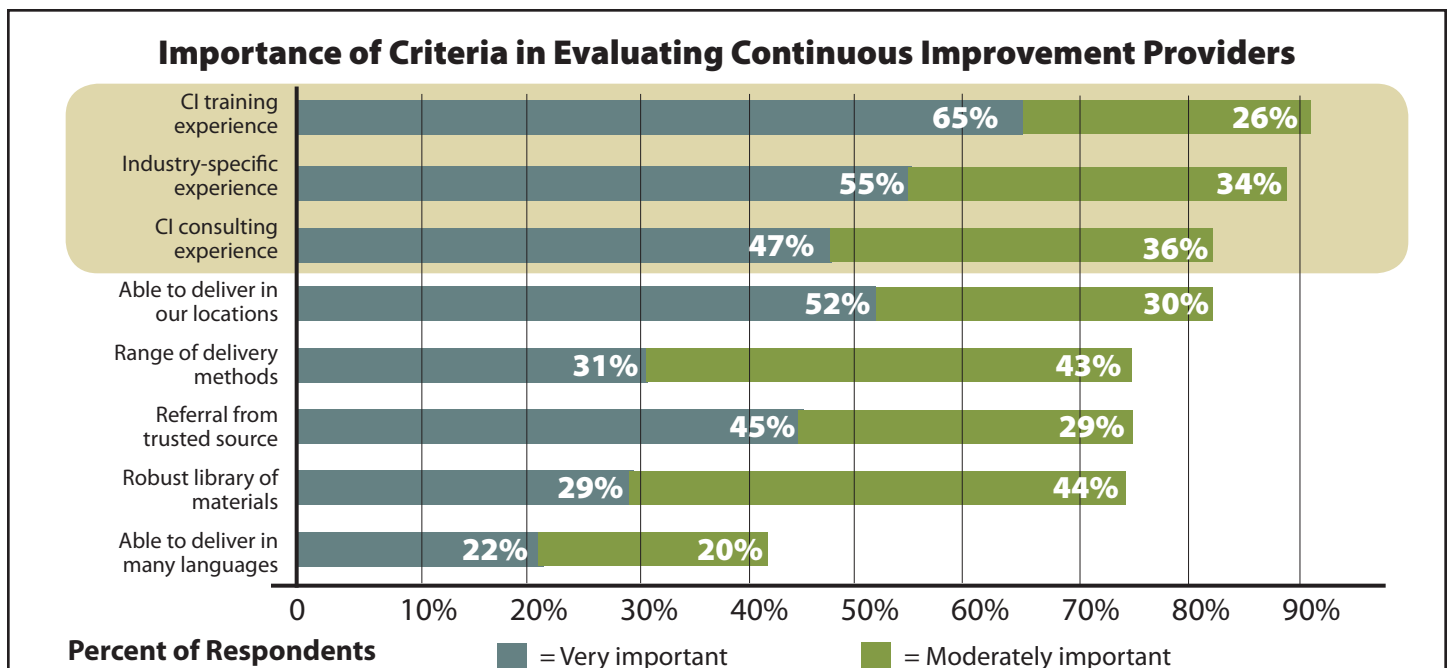
tinue to work with providers is that they offer flexible, responsive service. They value flexibility in providers' financial models as business conditions change and in providers' staff as they adapt to change processes. Looking for signs of this flexibility in evaluating providers will prove useful over time, especially for longer engagements.

In Summary

Companies seeking the assistance of learning service providers most often use them for content development and delivery, particularly for advanced or complex topics. Companies typically want flexible providers with a lot of experience who know how to align their solutions with companies' business needs.

Tracy Hollister is general manager of research at Training Industry, Inc. E-mail [Tracy at thollister@trainingindustry.com](mailto:Tracy@trainingindustry.com).

Figure 2



Source: Training Industry, Inc., 2010



WHERE THERE'S NEED, THERE'S OPPORTUNITY

LUNCH & LEARN

"I worked my whole life in the steel mills of Gary, and my father before me, I helped build this land."

— John Mellencamp, "Minutes to Memories"

I recently had the pleasure of joining a small group of ASTD members in the Raleigh-Durham area of North Carolina for a "munch and mingle" type of lunch, where people broke bread while debating the issues in their businesses or in our industry. I've been involved in programs like this as planner, as facilitator and as attendee, and I'm always amazed at how quickly strangers can come together around common challenges and shared visions.

This particular event was a "free for all" type meeting, with no specific agenda, meaning there were several concurrent conversations happening. I sampled several of them—the downside of business travel, good instructional design principles, talent management, difficult conversations—before settling into a nice discussion with a line training manager from a well-known manufacturer. I won't name names, for reasons that might soon be obvious.

The subject, of course, was training, and how this particular company structured its training at the manufacturing arm of the business. There was no CLO, I was told, and no director of training. The training, in fact, wasn't even done by division or department, but often line by line, manager by manager.

The line manager I was speaking with went further in his description of the business need that brought him to the conversational table. Not only was he dealing with training that was largely unstructured, but he was having trouble finding the types of training programs he needed.

For lack of clearer terms, he essentially wondered why so much "blue collar" training was designed by people with white collars. Where are the training tools designed for and by those with time on the manufacturing floor? There's no shortage of safety and compliance training at these locales, but the on-the-job training might not be getting the product support it deserves.

This is not exactly a new issue, but it's a big issue, with a large part of the marketplace not being served well. Accept this as an axiom: Where there's need, there's opportunity.

Cultural compatibility is a key to successful outsourcing and business partnerships. Of course there are vendors with a strong focus on the manufacturing floor, but clearly my lunch partner is still in searching mode. It's safe to say he's not alone.

So let me turn things over on this issue to our friends in manufacturing organizations, and those who support them. Where are you finding learning tailored specifically for the blue-collar worker? Are you buying such solutions, or building them yourselves? Do you train line workers with the same fervor that you develop the next generation of office managers? Should you?

Despite some rough years, manufacturing is still a backbone of American industry. I'm going to spend more time learning how that important branch of business is supported.

Tim Sosbe is editorial director of Training Industry Quarterly and general manager of webinars for Training Industry, Inc. You can e-mail Tim at tsosbe@trainingindustry.com.



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