**TD: Talent Development**

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**Vol. 74 Issue 7 - 2020**

- **A Vow to Readers.**

By: St. Gerard, Vanessa. , p4-4. 1p. 1 Color Photograph.

In a June 2 written statement, ATD President and CEO Tony Bingham says in part, "Injustice, inequality, and racism, in every form, are reprehensible. To provide resources to members, ATD has cura...

**Subjects:** TALENT development; TEAMS in the workplace

- **46%.**

, p6-6. 1p. 1 Illustration.

Of US firms cite access to new talent as a reason for expanding internationally. PHOTO (COLOR).

**Subjects:** ABILITY

- **Tech Firms Look Beyond Their Borders.**

By: HARLOW, JACK. , p7-7. 2/3p.

As of March 2020, participating companies were bullish on their strategy for international growth despite economic and foreign affairs uncertainty - 90 percent of US firms and 75 percent of UK fi...

**Subjects:** BUSINESS enterprises; TALENT management; Human Resources Consulting Services; Administration of Human Resource Programs (except Education, Public Health, and Veterans' Affairs Programs)

- **Ayoa.**

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COOL TOOL Mind mapping and task management collide seamlessly with technology via Ayoa. Launched this year by Creative Genius, Ayoa is a cloud-based mind mapping tool that boosts productivity, cr...

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In spite of the volume of work teams accomplish, less than half of companies reported that they have a dedicated L&D curriculum for developing teams. Only 28 percent of those with fewer than 1,00...

**Subjects:** TEAMS; TEAMS in the workplace

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How Organizations Identify High-Potential Employees 39% Talent review or 9-box ratings 31% Manager or performance ratings 18% Manager nomination 8% Standardized talent assessment SOURCE: REPAIRIN...

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By: THOMPSON, DERRICK. , p10-10. 1p. 1 Illustration.

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FAST FACT 88% of leaders say their organizations offer training and upskilling opportunities. 73% of employees agree.

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If those aforementioned scenarios describe your work life when you were still in the office, those issues are now mission critical given that most knowledge workers are working remotely. Less tha...

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Research During the first few months of 2020, the global coronavirus pandemic upended most of our lives. The practitioners came from various-sized organizations and were asked questions relative ...

**Subjects:** LABOR supply; COVID-19 pandemic; EMPLOYMENT of people with disabilities; LABOR productivity; EMPLOYEE morale; Temporary Help Services

- **Improve Processes With Internal Talent and a Solid Plan.**

By: OKOITI, ROSEMARY A. , p16-17. 2p.

The team determined that the root causes were an unclear, inefficient change process system and employees who did not receive training on how to handle the changes. In addition, because many empl...

**Subjects:** ABILITY; CROSS-functional teams; ORGANIZATIONAL change management; Human Resources Consulting Services

- **Get a Game Plan for VR Development.**

By: COLE, BRITNEY. , p18-20. 3p. 1 Illustration.

Fundamentals TECHNOLOGY APPLICATION Advancements in technology have opened doors for the talent development function to present training curriculums in more robust and dynamic ways. Be mindful th...

**Subjects:** EMPLOYEE benefits; Other Insurance Funds; Health and Welfare Funds

- **From New Employee to Brand Ambassador in 90 Days.**

By: WATTS, AMBER. , p22-24. 3p. 2 Illustrations.

Case in point SALES ENABLEMENT Quantum Workplace is an employee engagement software provider that captures crucial employee data for clients. Leadership discovered that employees were concluding ...

**Subjects:** NEW employees; EMPLOYEE rights

- **Get in Sync.**

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**Subjects:** BEHAVIOR; BUSINESS failures; WORK design

- **Connect the Dots.**

By: BAILEY, ALLAN; GILLIS, LYNETTE. , p32-37. 6p. 2 Illustrations, 1 Chart.

All talent development professionals would like to think that their learning programs have an impact on business success. But there is good news: There is plenty that TD professionals can do to n...

**Subjects:** BEHAVIOR; BUSINESS success; WORKING hours; ROAD maps; EMPLOYMENT references; Other printing

- **ROLLOUT READY.**

By: CONRAD, KERRI. , p38-43. 6p. 1 Color Photograph.

Imagine this: You are a sales curriculum manager for a large company and just learned that sales leadership plans to launch a third-party sales model to the global sales force. This article is ba...

**Subjects:** BEHAVIOR

- **What Continuing Education Knows About the Business of Learning.**

By: KING, TRACY. , p43-49. 6p. 7 Illustrations.

Siu rested her headset on its charger as her virtual seminar cohorts blinked off the screen. Education strategy An education strategy in business-to-consumer continuing education directs programm...

**Subjects:** CONTINUING education; ORGANIZATIONAL learning; CAREER development; Vocational Rehabilitation Services; Professional and Management Development Training

- **Feeling Like a Fraud?**

By: AQUINO, JASMINE. , p50-55. 6p. 1 Color Photograph.

Impostor syndrome can hinder career growth; however, individuals can take steps to overcome those negative thought patterns of self-doubt to achieve success. Impostor syndrome, also known as impo...

**Subjects:** IMPOSTOR phenomenon; FRAUD; HEALTH behavior

- **Not Your Ordinary Government Training.**

By: WHETSTINE, B. J.; LU SCHWEITZER, MARY. , p56-61. 6p. 1 Illustration.

Prior to this workshop, supervisors fulfilled their training requirement with online training or infrequent in-person offerings that only addressed one or two of the required topics. Those sugges...

**Subjects:** EMPLOYMENT discrimination; INDUSTRIAL relations; PERSONNEL management; Human Resources Consulting Services; Administration of Human Resource Programs (except Education, Public Health, and Veterans' Affairs Programs)

- **Build Better Relationships at Work.**

By: CUMMINGS, KELLIE. , p64-66. 3p. 1 Illustration.

Career gps MY CAREER In many ways, your professional growth will depend on your ability to foster trusting and supportive relationships throughout your career. Jane Dutton, professor emerita of b...

**Subjects:** POSITIVE psychology; INDUSTRIAL psychology; ACTIVE listening; PSYCHOLOGISTS

- **The Ripple Effect.**

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Books Harvard Business Review Press, 240 pp., $30 In Unleashed, Frei and Morriss center successful leadership on one concept: empowering others. The exercises helped me to better understand how e...

**Subjects:** BUILDING foundations; CHANGE management; Site Preparation Contractors; Framing Contractors; Masonry Contractors

- **Create Accessible and Compliant Training Videos.**

By: EDELBERG, ELISA. , p70-71. 2p.

Learning blueprint TECHNOLOGY APPLICATION As more and more of our lives move online, providing accessible video content will be critical to any corporate training ecosystem's success. Making vide...

**Subjects:** VIDEOS; INTERNET videos; STREAMING video; LOW vision; SPEECH perception; Audio and Video Equipment Manufacturing; Motion Picture and Video Production; Video recording merchant wholesalers

- **4 Plans for Employees' Return to the Workplace.**

p72-72. 1p.

Quick tips Following any major business disruption, employers must be deliberate about reboarding - reconnecting employees under new business practices - to obtain optimum performance. Discuss ne...

**Subjects:** EMPLOYEES; WORK environment

# editor's note

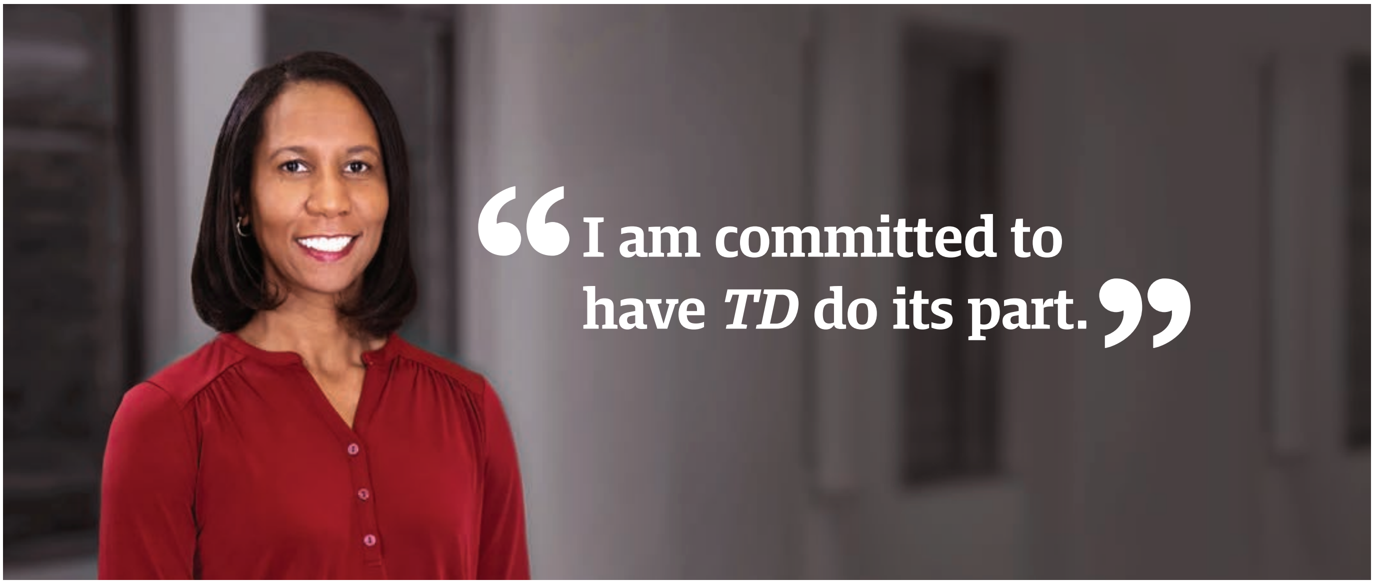


PHOTO | BEY BELLO

# A Vow to Readers

In a June 2 written statement, ATD President and CEO Tony Bingham says in part, "Injustice, inequality, and racism, in every form, are reprehensible. If we want to create a world that truly works better we must do the hard work of building cultures, communities, and workforces that are equitable, where diversity and inclusion are not buzzwords, but ingrained in the fabric of who we are and how we live and work."

To provide resources to members, ATD has curated its D&I content—many of which are *TD* articles—online at td.org/diversity-inclusion-resources. I encourage you to take a look at the numerous articles, videos, blog posts, and other material on the D&I webpage. Note that this isn't a static project. As you read this message, I'm in the process of working with my team to acquire more articles that focus on D&I.

In the months ahead, we will publish additional content in the magazine geared toward how talent development professionals can play a role in organization-wide diversity, equity, and inclusion efforts. The articles may take shape in the form of best practices, case studies, research, and interviews.

We all know that effecting change is not an overnight process. And I am committed to have *TD* do its part to present information that will help you move your organization toward a more equitable, inclusive, empathetic, and antiracist workplace.

There's more to come.

**Vanessa St. Gerard**
Editor-in-Chief
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# intelligence



**46%**

of US firms cite access to new talent as a reason for expanding internationally. ▶

IMAGE | ADOBE STOCK

GLOBAL OUTLOOK

# Tech Firms Look Beyond Their Borders

## Despite economic uncertainty, these companies are exploring growth potential around the world.

BY JACK HARLOW

Growth—every business, whether a small startup or a large enterprise, plans and hopes for growth. To meet those goals, many turn to international markets for the promise of new customers, economies of scale, and untapped talent pools. But with those opportunities come the myriad challenges that global expansion presents.

*The State of Global Expansion* report examined the prospects for firms entering new countries, based on a Velocity Global survey of 1,000 US and UK companies in the IT, software, hardware, and technology industries. As of March 2020, participating companies were bullish on their strategy for international growth despite economic and foreign affairs uncertainty—90 percent of US firms and 75 percent of UK firms plan to enter a new country within the next year. The COVID-19 global health crisis had yet to factor into their decisions.

To assess growth potential of regions outside the US and UK, the report evaluated the regulatory landscape, quality of infrastructure, population growth, economic strength, and availability of talent with the necessary skills. The last criterion is noteworthy for talent development professionals. Almost half of US firms and more than one-third of UK companies noted access to new talent as a reason for expanding internationally. Globally, Asia and Europe ranked as the two most desired regions for access to tech talent (according to 33 percent and 30 percent of US and UK firms, respectively).

Also covered in the report is Velocity Global's Global Expansion Tech Index, which ranks countries on their favorability as a growth location. Germany, Switzerland, the US, Sweden, and Denmark ranked as the top five for their availability of tech skills.

Global expansion, however, does not always follow a linear progression—for the number of companies that enter a new market, a similar number leave it. The report indicates that around one-third of US and UK firms have left a country for various reasons.

Enterprising talent development professionals can position themselves as assets to companies exploring global expansion. With organization development and talent management capabilities, they can identify high-potential talent to acquire, oversee updates to strategic workforce plans, and manage culture change efforts.

**Jack Harlow** is a senior developmental editor for ATD Press; jharlow@td.org.

COOL TOOL

# Ayoa

Mind mapping and task management collide seamlessly with technology via Ayoa. Launched this year by Creative Genius, Ayoa is a cloud-based mind mapping tool that boosts productivity, creativity, and memory.

Sometimes referred to as a brainstorm or spider diagram, a mind map is a visual thinking tool used to capture information and ideas. As a first step to mind mapping, users start with a main idea and then add new thoughts or considerations as branches off the central concept.

Cloud-based software like Ayoa is a natural fit in today's increasingly remote workforce. The tool creates a digital space that is conducive to team brainstorming and enables remote workers to collaborate with ease. Users can share mind maps with other account holders and give fellow users select permissions to view, edit, comment, and add branches to the virtual boards.

The software's versatility and built-in task management functions enable users to move their projects from concept to completion.

Ayoa is available to download on desktop (Windows and Mac) and Apple and Android devices. No-cost basic access enables users to create and edit up to five boards. Advanced access options are available, as are demonstrations on ayoa.com.

IN PRACTICE

# It's Time to Develop Teams

## The majority of companies admit they aren't investing in team development.

BY ELIZA BLANCHARD

Talent development professionals generally design programs aimed at improving individuals' performance. However, the Brandon Hall Group's new research shows that investing in team development can be a more effective path to improved organizational outcomes.

Brandon Hall Group surveyed 266 organizations representing a wide range of industries and various company sizes. The study found that teams are critically important to organizations, with seven in 10 companies reporting that more than half their work is accomplished through teams and six in 10 saying that the amount of work accomplished through teams will increase during the next few years.

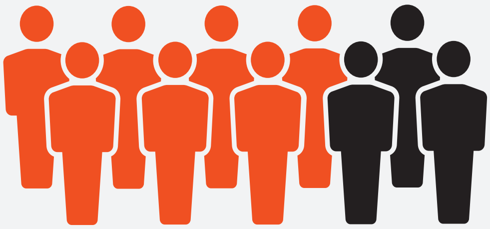
In spite of the volume of work teams accomplish, less than half of companies reported that they have a dedicated L&D curriculum for developing teams. This number varies greatly based on workforce size. Only 28 percent of those with fewer than 1,000 employees and 35 percent of midsize companies (between 1,000 and 4,999 employees) have a dedicated team development curriculum. In contrast, 61 percent of large companies (more than 5,000 employees) have an L&D curriculum specifically devoted to teams.

According to the study, 77 percent of organizations cited competing priorities as a reason they do not invest in teams, making that by far the most common barrier to team development. However, the study's

BONUS APP CONTENT



IMAGE | ADOBE STOCK



**7 in 10**

organizations accomplish more than half their work through teams.

authors argue that team development should be a top priority, given how much teams do. They also note that many components of working effectively in teams, such as emotional intelligence and collaboration, would support—rather than conflict with—other business priorities.

Companies seem to realize that they are missing the mark when it comes to team development, with 77 percent admitting they are not investing enough time and budget into team development. That can have a real impact on the bottom line, with those that invest in team development being 2.7 times more likely to see increased employee retention. Those same companies have a 2.2 times greater chance of employees being more engaged. With stakes that high, team development training is a worthwhile consideration for any workplace L&D curriculum.

**Eliza Blanchard,** APTD, is a content manager for ATD; eblanchard@td.org.

INFOGRAPH

## Boost Employees Up the Corporate Ladder

### How Organizations Identify High-Potential Employees


SOURCE: *REPAIRING THE BROKEN RUNG: OVERCOMING BIAS IN THE LEADERSHIP PIPELINE,* PINSIGHT, 2020

IMAGE | ADOBE STOCK

# Attitudes Toward Outskilling Have Evolved

**Employers are increasing their attention on and beginning to implement programming to outskill employees.**

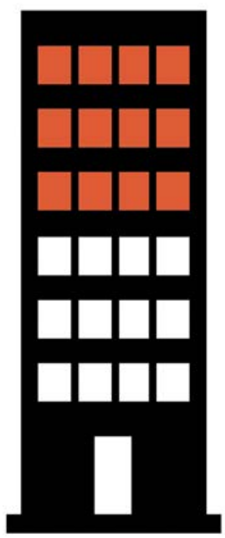
BY DERRICK THOMPSON

Training and development has been and will continue to play a critical role in organizations. But it's not just existing training content designed to hone and increase employees' skills that is part of a retention and internal promotion strategy. Now talent development professionals will likely play a role managing and administering outskilling curriculums. Through such programs, workers fated for furlough or layoff receive training from their employer for career opportunities in other organizations and industries.

While it's tempting to link the increased attention on outskilling with COVID-19, findings from a Penn Foster survey in early 2020 indicate that the practice has been top of mind for business leaders since before the pandemic. At the time of the survey, half of CEOs said they anticipate job displacement in their company within three to five years, with automation being a key factor. In the wake of mass disruption to businesses because of the pandemic, experts say companies' adoption rate of outskilling programs is likely to increase.

"Historically, business leaders—both L&D professionals and the C-suite—have understood the value of outskilling but not invested in it as an urgent priority," says Dara Warn, chief operating officer of Penn Foster. "And while the pandemic didn't create the need for outskilling, it very well may have accelerated the momentum at which outskilling programs become available at leading employers."

Outskilling advocates cite numerous benefits, such as success stories of participants landing higher-paying jobs; organization brand and reputation and being seen as socially responsible; and a significant reduction in layoff-related lawsuits.



**1/2**

of CEOs anticipate job displacement in their company within three to five years.

However, the Penn Foster survey findings unveil a significant say-do gap among respondents. While 80 percent of businesses say they see value in outskilling, only 40 percent support that value with any kind of programming. Experts point out there is evidence of an evolving attitude toward outskilling, and they anticipate the practice will continue to grow in importance.

"We're already seeing employers adopt new ideas in response to COVID-19, like Verizon and Accenture's effort to connect laid-off or furloughed workers with new job opportunities," says Warn. "Findings like this may spark renewed urgency to invest in emerging approaches to workplace learning, like outskilling, that can help workers navigate the shifting landscape."

**Derrick Thompson** is a writer/editor for ATD; dthompson@td.org.



IMAGE | ADOBE STOCK

WEIGHING IN

What new L&D initiatives are emerging because of the mass migration to being a virtual workplace?

"Coaching will become compartmentalized and mandated for all employees. Bite-sized learning capsules will be developed for all learning programs. L&D professionals will likely serve as chaperones for major virtual meetings and play a larger role in organizational development."
**—Billy Paul Ebenezer, Chennai, India**

"Besides the fact that more people will understand the benefits of virtual tools, I think we will finally see more action during live events (virtual and in-person). There are so many tools that can help deliver information and check for understanding prior to live sessions. Trainers will begin to use that precious time together for things like clarification, practice, and reinforcement instead of information delivery. Use prework to prepare learners with the information and expectations. Use live time together to clarify, discuss, and practice. Then use ongoing reinforcements and touch back."
**—Mike Garber, Allen, Texas**

"I think we're going to see a greater emphasis on blended learning. Through all of this, we are learning that virtual training is possible and often more efficient, but there are still some things that are meant to be done in person. Having a greater understanding of what needs to be instructor-led training versus e-learning can help companies, schools, and everyone make the most of their resources and better manage their time."
**—Mackenzie Lauka, Indianapolis, Indiana**

PRACTICAL POINTERS

# Visualize L&D Projects

## Use storyboarding to plan before starting a project.

In "Storyboarding: The Power of Planning," Martha Stott writes, "Every talent development professional who is developing a visual learning product—such as a video tutorial, short animation or motion graphic, interactive media sequence, e-learning module, or virtual reality learning event—needs to know how to create a storyboard." A storyboard helps organize your thinking as you develop a story. To get started, use tried-and-true L&D principles.

**Know your audience.** Understanding your learners helps determine the starting point of a project and its length. Should the video begin with the basics, or do learners already have a foundation with the topic? If you don't know, you run the risk of frustrating learners or boring them. Either way, you'll lose their attention.

Further, how will employees access content—a laptop, phone, or smartwatch? That will affect the way you design the visual learning product.

**Know the learning objective.** Using the 5 Whys technique, in which you drill down to determine the root cause of a learning challenge, will help you design your storyboard. Why are learners not behaving the way leaders want them to? Is it because they don't know how, they don't have managerial support, or the organizational culture does not encourage the behavior? Focus on what employees really need to be able to do.

**Know when the project is due.** Work backward from the due date to develop a timeline for your project, keeping in mind that stakeholders and subject matter experts may not understand storyboards. Build in buffer time, especially when you begin to collaborate with others.

MORE ONLINE
These tips were adapted from the July 2020 issue of *TD at Work*. Learn more at td.org/TDatWork.

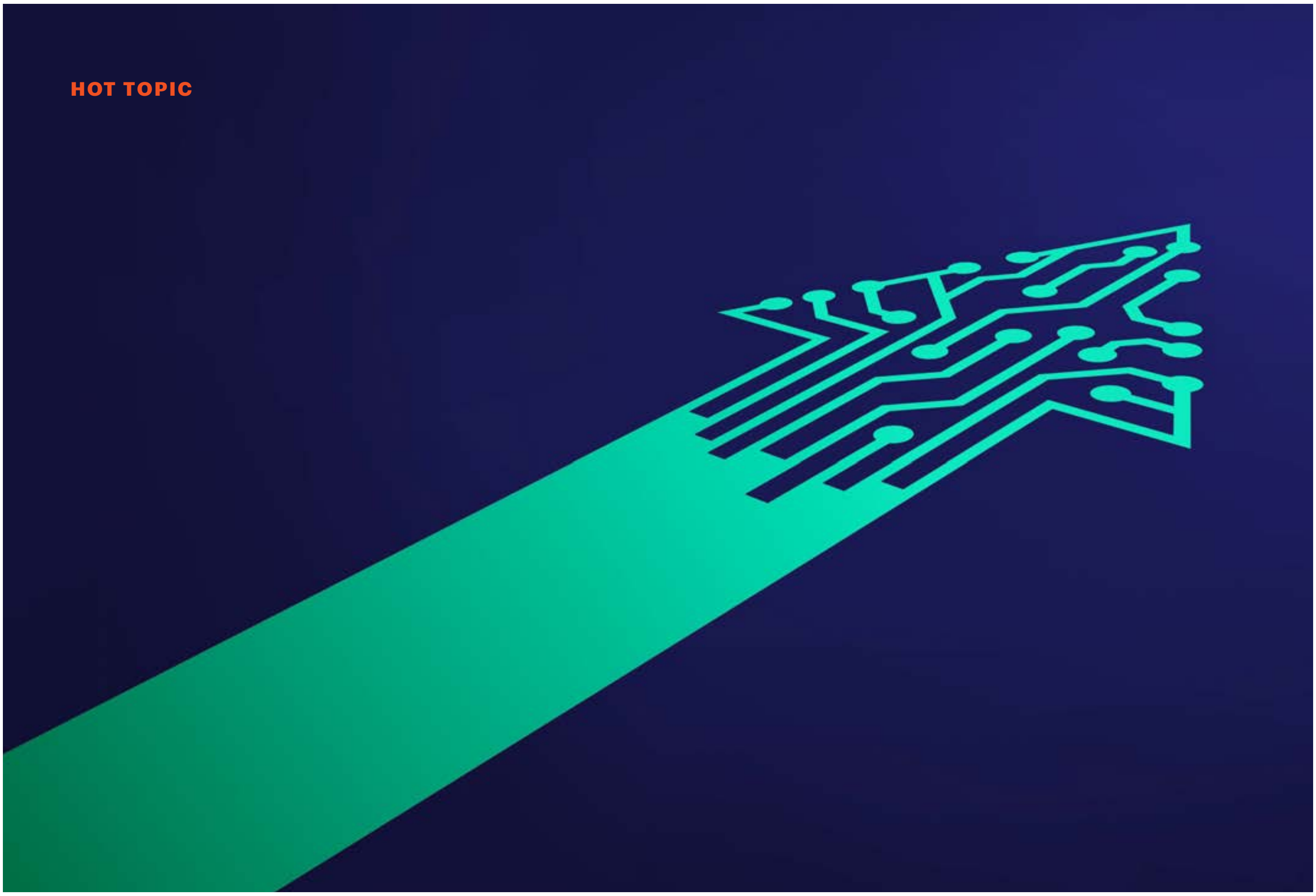
FAST FACT

# Perception Differs From Reality

**88%**
of leaders say their organizations offer training and upskilling opportunities.

**73%**
of employees agree.

SOURCE: *GETTING TO EQUAL 2020,* ACCENTURE




# Digital Transformation Is Mission Critical

## Organizations must prioritize their digital preparations and security.

BY HANNAH STERNBERG

Your VPN crashed right before you saved a file. Customer data may have been exposed through an insecure application. You spent half the meeting trying to get attendees from inside and outside the organization to log into the enterprise communication platform successfully.

Those were some of the pressing issues in a rapidly transforming workplace in October and November 2019 when Infosys conducted its survey for the *Workplace Transformation Research Report*. At that time, a majority of respondents ranked digital innovations as having the most impact on workplace transformation. Since then, moving work into the digital world has shifted from a prudent choice to an urgent measure necessary for organizations' survival.

If those aforementioned scenarios describe your work life when you were still in the office, those issues are now mission critical given that most knowledge workers are working remotely. Now that digital transformation is here to stay, how should organizations be prepared? According to the report, respondents identified three factors.

BONUS APP CONTENT



IMAGE | ADOBE STOCK

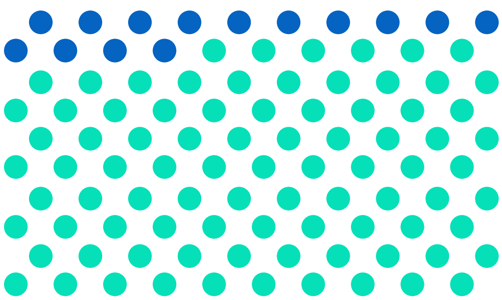
**Data security should be the most pressing concern.** It's not enough to shift work to the digital sphere and plug security holes as you find them. Build in data security from day one.

**Digital transformation takes commitment from everyone.** Preparing for a digital workplace isn't a task for IT alone. Buy-in has to go all the way up to the CEO, because this is more than a systems change—it's a culture change.

**External partners are more important than ever.** You can't build every digital solution you need, and off-the-shelf products aren't robust enough for large, complex workplaces that are entirely remote. Partnering with enterprise suppliers to craft customized technology solutions is key in transforming the workplace.

Less than a year ago, generational differences were seen as a main driver of workplace transformation, as millennials moved up the ladder and brought with them new expectations for work and life. No one could have predicted that a global pandemic would propel the workplace into the future this rapidly, but the good news is the changes coming are what you've been preparing for all along. Now is the time to step up and change the workplace for better productivity and engagement with digital solutions that don't just patch existing problems but build a foundation for success in a transformed world.

**Hannah Sternberg** is a production editor for ATD Press; hsternberg@td.org.



**86%**

of chief experience officers believe workplace transformation can enhance collaboration across teams.

WORD WIZ

# Gaze Awareness

Use of video chat services like FaceTime, Houseparty, Skype, Teams, and Zoom have experienced an unprecedented increase in usage in recent months. In December 2019, Zoom, for example, boasted a healthy 10 million daily meeting participants. Compare that figure with the whopping 200 million daily meeting participants in March 2020.

But even though you are behind a screen doesn't mean your body language no longer matters. If anyone on the other end ever has asked "What are you looking at?" it could be a clue that you've lost focus.

In the article "Effect of Videoconferencing Environments on Perception of Communication," Petr Slovák introduces the term *gaze awareness*: when those communicating are well aware of another individual's gaze direction.

Slovák points out that a great amount of information is passed through gaze and facial expressions during a communication. During face-to-face encounters, for example, eye contact is of paramount importance. Similarly, daydreaming, staring in the distance, scrolling on your phone, or similar behaviors during a virtual meeting may signal disinterest or lack of attention, which is considered inappropriate for professional interactions. For personal video chats, the rules are much more relaxed, but if you're aiming for professional conduct, it's important to keep your gaze in check.

OFF THE WIRE

# Skilled America

The National Skills Coalition has launched the *Skilled America* podcast. Hosted by Rachel Unruh, chief of external affairs at NSC, the podcast series is devoted to the policies, politics, and people driving the discussion on skills in today's economy.

The series began in April, and the roster of guests to date has included business leaders from the manufacturing, healthcare, and education industries. Unruh has spoken with frontline industry leaders to discuss some of the new challenges in workforce development brought on by the pandemic. While conversations are not completely focused on L&D, listeners will hear leaders share concerns about the workforce at large. In those conversations, talent development and associated concerns rise as a common, recurring theme across episodes.

In the episode "Manufacturing a Response," manufacturing industry leaders discuss how their companies have adapted in the age of social distancing and what they think about the sudden attention their essential work has brought. And in "The Digital (Learning) Divide," education leaders discuss concerns shared by instructors tasked with creating new learning environments.

Episodes run around 30 minutes and are released weekly. Access *Skilled America* via Apple Podcasts, Spotify, Google Podcasts, or Stitcher.

**4 out of 5**

organizations are concerned about employee morale.

# Maintaining a Productive, Inclusive Workforce Amid the Pandemic

## Most companies are considering employees' individual circumstances and well-being.

BY PATTY GAUL

During the first few months of 2020, the global coronavirus pandemic upended most of our lives. The uncertainty continues, with some communities and demographics feeling the upheaval to a greater degree than others.

Against this backdrop, in mid-March, Paradigm—a diversity and inclusion services provider—surveyed 135 diversity, equity, and inclusion (DEI) and HR leaders across the US for its whitepaper, *Inclusion in the Time of Coronavirus: How to Support an Inclusive, Effective Remote Workforce.* The practitioners came from various-sized organizations and were asked questions relative to their diversity efforts, remote work practices, and concerns about workforce issues during the crisis.

Paradigm reported that companies are concerned not only about organizational productivity but also about how their employees are faring health-wise. Eighty-four percent of respondents said they are worried about both their employees' health and their sense of connectivity. More than three-quarters (79 percent) expressed concern about employee morale, and 52 percent cited concerns about employee productivity.

Given the survey occurred before the protests against racial inequality began in earnest, what may be surprising is that 78 percent of organizations said they are maintaining or even increasing their DEI efforts. Speaking to the rapid pace of organizational change that business leaders and employees are facing, the whitepaper states, "For forward-thinking companies—those that care about building best-in-class cultures that work not just for some employees, but for all employees—DEI will play a fundamental role in guiding this transformation." It is noteworthy that so many organizations are maintaining an eye on their DEI efforts: "When change happens quickly, organizations often inadvertently take shortcuts and make fast decisions that undermine their inclusion goals," the report continues.

It's important that businesses remember that different populations are affected in unique ways during this time. For example, there has been an uptick in anti-Asian racism. And employees with disabilities or those who are otherwise immunocompromised are at a higher risk of contracting the virus and may not be able to get the medicine or care they need.

The Paradigm whitepaper recommends that leaders encourage managers to check in frequently with their direct reports, offer flexibility in terms of work hours, and establish fair processes for stretch assignment opportunities that the rapid change may have brought about.

Further, it advises organizations to be transparent with employees, probably now more than ever: "Communicating clearly, actionably, and consistently about updates to the business, estimated timelines, and safety measures will be critical in this rapidly changing environment."

BONUS APP CONTENT

**Patty Gaul** is a senior writer/editor for ATD; pgaul@td.org.

# Improve Processes With Internal Talent and a Solid Plan

You don't need an outside consultant or a lot of time to fix broken systems.

BY ROSEMARY A. OKOITI

Making organizational change is often more complicated than it sounds. Frequently, the change requires alterations to several processes, functions, and systems that seemingly are outside the department or area where the changes are occurring. One seemingly solitary change can affect many departments.

Therefore, one of the first steps in modifying an organization's process is to make sure that changes do not have an adverse consequence on other systems. That requires an additional layer of safeguards. At one of the companies I worked for, the talent development function was responsible for managing change, which involved many activities, including ensuring that employees followed proper procedures.

What I quickly realized was that as the talent development function tried to implement change, there were several other changes also taking place—and they lacked proper documentation. Company policy mandated that before a change is implemented, the change manager must inform other departments that may be affected and receive sign-off. That notification and sign-off often was not happening, which made it difficult to track changes and move forward according to proper procedure.

Many of the employees and even managers who were handling the changes had limited knowledge of what they needed to do to appropriately follow policy and standard procedure. As a result, many changes were simultaneously taking place in the company with scanty documentation, which caused change projects to take too long to close. Staff were wasting a great deal of time going back and forth discussing what needed to be done and how.

Additionally, employees were frustrated because they were not sure what the company expected of them and because the system for altering a product or process was not working efficiently. Given the organization's requirement that products be released for shipment only after change managers completed all related documentation and management provided approval, the company experienced product release delays and financial losses.

I joined forces with a colleague from the regulatory team to discuss and address the challenge and its repercussions on the business. We decided that the best solution would be to revamp the whole change process. First, we formed what we called the extended team, a cross-functional group of staff from regulatory, quality (training), operations, engineering, and production. The extended team comprised 12 members whose mandate was to identify via brainstorming sessions the root causes of the change process challenges.

The team determined that the root causes were an unclear, inefficient change process system and employees who did not receive training on how to handle the changes.

**Resources Used**
Cross-functional teams benefited from the expertise of colleagues and their swath of perspectives and insights. The teams also contributed to gaining buy-in from across departments.

**Time Saved**
Involving users in the process enabled the team to learn firsthand the change process's challenges.

**Benefits**
A plan broken into three parts gave the team some early, easy wins, creating momentum to continue moving forward. It also allowed for urgent changes to be made.

It classified solutions into three categories:

- Short-term solutions were the low-hanging fruit that the team could solve within one week.
- Medium-term solutions needed one to two months to implement.
- Long-term solutions needed more than two months to implement. Ideally, those solutions required management approval and employees to be trained prior to their implementation to ensure staff would follow the processes correctly.

A core team of five people from among the extended team worked on the project through to completion, calling in other members of the organization as needed on a given process. The following measures detail the change process core team members followed.

Short term:

- introduced weekly meetings between the change owners and management during which change owners could discuss issues that needed to be addressed for their change projects, seek clarifications, and get approval to implement the changes or have the changes signed off on for closure
- worked with the owners of new urgent change projects, coaching them on what they needed to do under the current system so they adhered to protocol
- had nonurgent changes put on hold until after employees received training to ensure that they knew how to perform the change process correctly.

Medium term:

- redesigned the change process with clear step-by-step guidelines from start to finish, including examples that provided further guidance for employees and managers
- re-created supporting forms, removing ambiguous terms and retaining only the necessary information
- presented the draft procedures and forms to the extended team, change owners, and management for their input and approval
- designed two training programs—one for the change owners and one for change assessors.

Long term:

- trained the change owners and the change assessors
- conducted a mock change process with all change owners and assessors
- executed coaching sessions and consultations to ensure that the trainees understood what they needed to do, when, and why when implementing the change process
- instructed the trained owners to implement the nonurgent changes and monitored the process, which ensured that the new process worked as envisioned
- asked the change assessors to complete their assessment
- conducted an effectiveness verification to ensure that employees had followed the process as spelled out.

**SOLUTION**

When making organizational changes, have a clear process in place and ensure that all people who are involved understand and can use the process efficiently.

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Leveraging subject matter experts from different departments helped make the organizational change process more user-friendly, more efficient, and less time consuming, which ended up saving the company more than 30 hours each week of staff time—an ongoing time savings.

At the end of the change exercise, the organization noted several visible positive results. Most notably, workflow improved even though there were fewer employees. During the change process improvement, the company lost two employees who were active change owners. Despite fewer workers, implementation of the new process moved onward with a smooth workflow.

Change owners and assessors now knew when to initiate changes, how to carry out the process, and why they had to follow it. Everyone was on the same wavelength because they had clear instructions and adequate training. In addition, because many employees were part of the change process, there was already buy-in on the process design.

Employees no longer wasted time asking about what should be done. There was never disagreement between employees or managers in different departments about what needed to move the process forward; the next steps were clear.

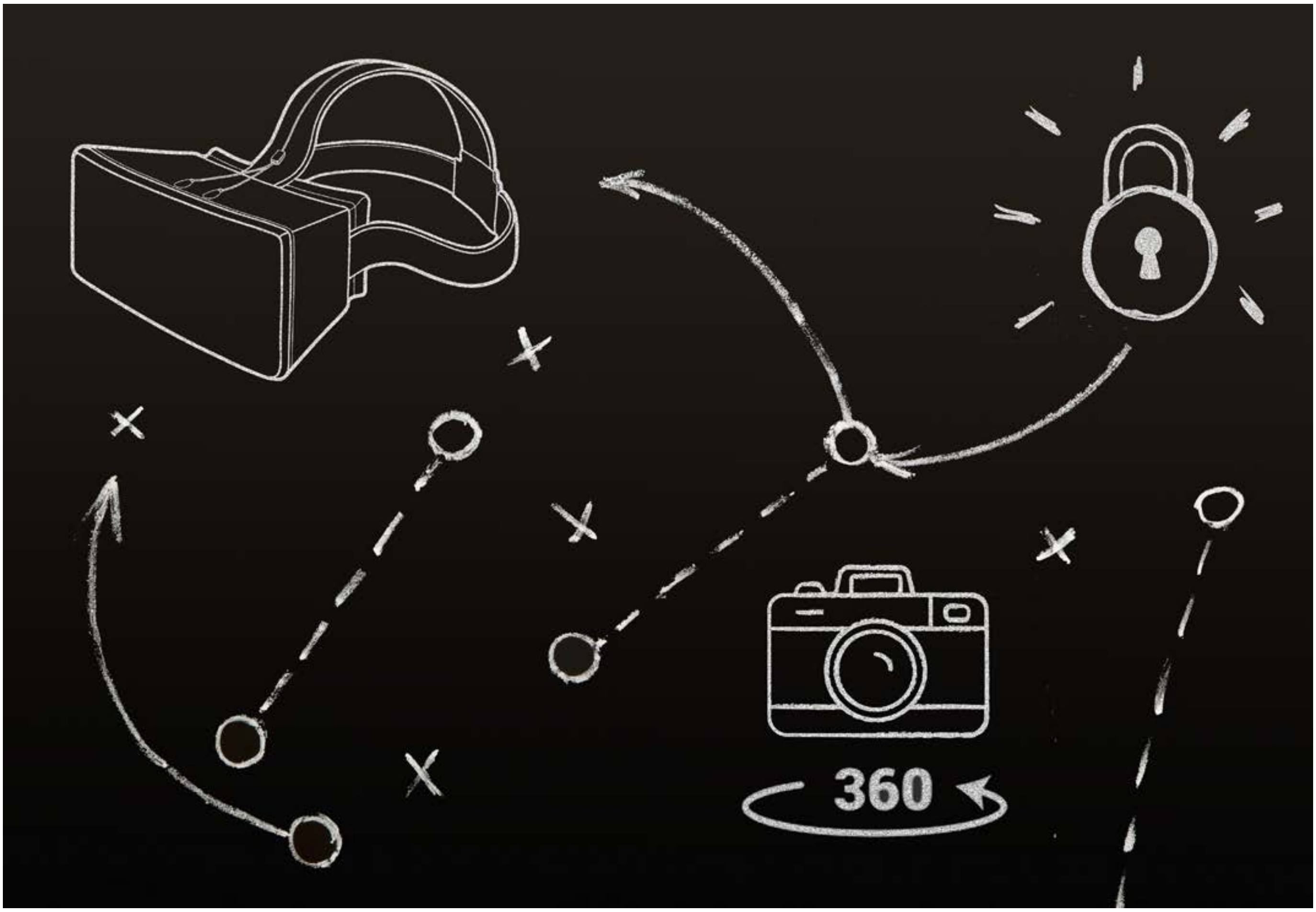
Finally, all relevant documents became easily accessible on a shared drive. Everyone who needed to use documents and other necessary information for the new process knew exactly where to find the materials.

Because of the new implementation, the company experienced no more delays in product releases. That saved time as well as money, because customers were getting their orders on time.

**RESULTS**

The new, clear process saves the company more than 30 hours per week in staff time.

**Rosemary A. Okoiti,** CPTD, has experience in training delivery; design; and managing leadership development, compliance, and onboarding; linkedin.com/in/rosemaryokoiti.




# Get a Game Plan for VR Development

## Think through all the factors associated with creating a virtual reality experience.

BY BRITNEY COLE

Advancements in technology have opened doors for the talent development function to present training curriculums in more robust and dynamic ways. Here you are, a talent development professional in a forward-thinking company, and after a training needs assessment, you determine that midlevel leaders and supervisors would greatly benefit from training on meeting management and crucial conversations. Sure, you could do a little research, put together a PowerPoint presentation, host a session where you share a relevant story, and throw in a bit of role play as icing on the cake. But your goal is to ensure your organization remains on the vanguard of talent development. As such, you begin to explore virtual reality (VR).

While conducting research, you realize there are many considerations and decisions



IMAGE | ADOBE STOCK

to make—3D or avatar versus live action? Custom build versus off-the-shelf development tool? Self-directed versus facilitated in a classroom? Which headset to buy? Native app versus web delivery? Track completion or not? Every decision affects the other.

In all candor, you recognize when compared to the investment, the user's time in experience is short—how do you justify the expense? Before you start buying 360-degree cameras and purchasing trials of VR development platforms, the following steps will help guide you as you build a learning experience that will meet your organization's business needs and resonate with the audiences you serve.

## Make the case

Designing a learning experience that employs VR technology can seem overwhelming given all the different factors to consider. To successfully see this undertaking from concept to completion, you'll need a tight game plan. As a starting point, clearly identify the audience, business needs, and desired outcomes and envision what the end product should look and feel like.

From a cost perspective, a five- to 10-minute VR module can be on par with a highly engaging 30-plus-minute branched e-learning course. Because the price is higher for something that will take less time for users to experience, it is important to identify the benefits to employees and the organization. Moreover, to gain sponsorship and buy-in, you must demonstrate how VR can build employee knowledge and skills and do it in a more engaging and effective way than classroom training, hands-on labs, branched e-learning courses, or any other learning modality. Here are some reasons VR is a worthwhile consideration when designing your next learning experience.

**Lower costs in the long term.** One way to reduce expenditures is by using VR to recertify workers in an annual safety procedure or compliance exercise that would otherwise require classroom training and travel for people to attend.

**Less time.** VR use can often shorten a classroom experience by 30 minutes or more, which can enable facilitators to cover another topic or, by releasing participants early, increase productivity.

**Lone option.** Without VR, learners would not be able to otherwise experience the scenario because it is too dangerous, such as an active shooter situation; impossible, such as examining a patient's anatomy; or rare, as in the case of providing a tour of a faraway manufacturing location.

**Leading option.** While learners could learn how to have a difficult conversation via role play, uncover their unconscious bias via an e-learning program, or repair equipment via an online simulation, the learning experience and engagement would greatly improve with a VR simulation in which the participant could practice those skills in an immersive environment.

When proposing what may be a new solution to your employer, understand that decision makers want to know details. Be prepared to communicate the what, why, when, and how of a solution. And although VR is in a stage where there are many unknowns, do your due diligence in detailing the plan. At minimum, address the unknowns and identify what you may need to do after receiving the go-ahead.

A telecommunications company identified VR as a compelling use case for managers to practice their conversational capacity, balancing being curious with speaking candidly. As part of the experience, the leader manages a meeting with a low-performing team while dealing with conflict. Immersive VR enables managers to practice these challenging skills in a way that is authentic and builds capability. I'll reference that use case as I direct you through the process of developing your plan.

## Baseline decisions

To start, decide whether the VR experience should be live action (filmed in 360 degrees or 180 degrees) or created in 3D using avatars. If live action, will you film it yourself? If yes, will you buy or rent a camera to do so? Will you hire actors or use internal staff?

Conversely, if you go with 3D, will you build out new customized environments, assets, and avatars or use what is commercially available? Will you hire someone with the skill set to build the needed assets, such as an animator, or outsource it to a specialty firm? If outsourcing, consider both larger learning providers and content or leadership specialty companies.

For the use case, the team opted for live action to make the experience as authentic as possible. To test the concept before making a large investment, the company didn't hire actors. Instead, it used the internal marketing team and

**Although VR is in a stage where there are many unknowns, do your due diligence in detailing the plan.**

additional staff to do the filming and acting. Also, it purchased a 360-degree camera because if the concept worked well, the company would be able to film additional vignettes.

## Envision the user's journey

Next, decide if the experience will be guided, branched, or open ended. Guided means the entire experience is controlled: The participant has no ability to navigate or make choices and either watches as an observer or is prompted to complete tasks—say something, look at something, or do something, for example. Tasks that a user completes do not affect the outcome. If you design a guided VR journey, determine what the learner will be expected to do during the experience.

A branched scenario is when a participant must make decisions at points during the experience. Based on the choices they make, they receive feedback and possibly face consequences. Each branch presents new challenges and more choices, which enable the story to unfold in unpredictable ways and create multiple outcomes.

The skill set required to build a branched VR experience is not entirely different from designing a branched e-learning course. So, if you can build a branched e-learning program, you can develop a branched VR experience. When building the scenario, determine what decision points are necessary to create a meaningful outcome and build the desired skill set.

Finally, open-ended scenarios require input from the participant to trigger responses from the VR experience. For instance, the user must say, or not say, certain keywords, look at certain areas of the environment, or use a combination of phrases to progress to the next part of the experience. For open-ended scenarios to seem authentic, a lot of coding is necessary.

In L&D, it's still not entirely viable to have a fluid conversation in VR, but things are evolving. You can use this approach for personal effectiveness or soft skills or leadership development, but you may frustrate learners if the VR engine doesn't understand tone, complex phrases, or intent.

The telecom company sought to create an open-ended experience for managers to practice how to lead a team meeting when the team is in conflict. However, it knew that there are multiple ways to manage conflict and did not want to rely on specific words or phrases. Therefore, the team ultimately determined a branched scenario would be best: The manager would observe the meeting's dynamics and, at certain points, would have to choose from several options to intervene. Based on the decisions made, the meeting outcomes would change.

## Platforms and tools

At this point, figure out how you will build the experience—in-house or via an agency. Internal staff can use custom tools such as Unity or Unreal Engine or a rapid development tool, which includes platforms such as CenarioVR, Captivate, or Pixvana.

Based on the decisions made and the telecom company's internal capability, it selected a platform it was already using. Although there were some limitations to the platform's functionality, it helped the team test the approach and determine whether it needed a richer experience that required custom development.

Be mindful that a training team can deliver VR experiences as a self-directed asset where learners can complete it on their own time or as a facilitated activity with a trainer leading it. The path you choose will determine the tools learners will need to take part in the experience. Sample considerations for self-directed experiences include headsets, phones, and laptops.

The telecommunications company wanted the VR experience to be flexible so it could stand on its own as a self-directed asset for mastering skills and be used in conjunction during a formal classroom experience.

## Additional factors

In building your plan, don't forget to think about security needs. If this experience needs to live behind a firewall due to the presented content, options include offering the experience via a native app, having it live locally on a headset, or placing it behind a secure login. And finally, when designing your VR experience, strive to keep the experience as evergreen as possible and determine when updates will be necessary.

In the use case, because the company published to HTML, it was able to manage updates. Putting the experience on devices would have required the company to manage updates remotely or have the devices shipped to the development team, which could have caused some logistical issues. The team continues to evolve its approach, but it ultimately agreed on a VR experience that was easy, flexible, and meaningful for the participants.

Indeed, VR as a learning modality has many variables and decision points. But it's exciting that VR has become commercially viable in L&D and can be a cost-effective and powerful solution when the use case is aligned and you go in with a strong game plan detailing the learning experience's design, development, and deployment.

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# From New Employee to Brand Ambassador in 90 Days

A reimagined onboarding experience helps new sales employees immediately immerse themselves in organizational culture and workflow.

BY AMBER WATTS

Quantum Workplace is an employee engagement software provider that captures crucial employee data for clients. It was the company's own survey data, however, that shed light on crucial gaps in its sales onboarding experience. Leadership discovered that employees were concluding their onboarding with a final demo test of the software, yet they still had a limited understanding of either the product or the HR executives buying the software. That gap was causing call reluctance and wasted time on buyers who were not a fit for the product.

"The original onboarding process was established in late 2018 when, for the first time, we had an influx of new sales hires and I knew we had to drive a more structured sales onboarding process," says Darren Noble, vice president of sales, who organized the initial sales onboarding experience. With that awareness, the company aimed to:

- Take sales employees through five phases of onboarding that progress with their readiness.
- Increase new employees' knowledge of what engagement means.
- Increase knowledge of how Quantum Workplace's software measures and drives engagement.
- Help employees understand what a day is like in an HR executive's shoes.



IMAGE | ADOBE STOCK

## Quantum Workplace

**Industry:**
IT

**Workforce Size:**
105

**HQ Location:**
Omaha, Nebraska

**Founded:**
2002

### Identifying learning champions

The redesigned 12-week onboarding experience requires the commitment of employees at all levels to develop their newest teammates. As a small, rapidly growing organization of 75 employees, Quantum Workplace recognized that tenured staff were vital to onboarding success. Accordingly, the company engaged select tenured workers as learning champions to play a key role in guiding their new teammates through each of the onboarding program's five phases.

Another learning champion in the new onboarding program is a mentor. After receiving feedback that employees wanted more development conversations, the company identified staff who would make ideal mentors to engage in such conversations. Mentors meet with new employees weekly to review key learning objectives and prepare for new hires' upcoming skill demonstration. Mentors meet these requirements:

- hired in the past 18 months
- possess a strong focus on "team over self" (one of the company's core values)
- are meeting performance goals
- are seeking leadership experience.

No onboarding experience is complete without integrating leadership's legacy knowledge. Via the learning management system, the company launched a new learning series focused on the software's story. The lessons detail each feature individually: surveys, goals, recognition, one-on-ones, feedback, and vitals. In addition, each lesson takes new employees through the company's journey of product philosophy, function, customer stories, and videos featuring the leaders who were part of the launch.

When new hires of any organization receive a company history lesson on day one, they are likely to forget it because it isn't memorable. Quantum Workplace found that reviewing the history with new employees a few weeks later and including leaders' voices results in the information better resonating with new hires. That subsequently influences them to tell the company's story to their prospects and buyers. By taking that extra step, new hires went from knowing a simple elevator pitch to becoming a brand ambassador.

### Progression

The final demo test was still a crucial step in the onboarding journey, but with the pass rate resting at 25 percent on the first attempt, the company needed to adjust the learning experience leading up to that day. Thus, employees now take the final test one week later to allow time for them to gain more knowledge of the buyer and the software.

To increase learning retention of the added content, the company created Rock-It Moments (a rocket is part of Quantum Workplace's internal and external brand) that are aligned with the six certifications the company offers. "Breaking out certifications for each stage builds confidence and also gave us an opportunity to recognize our current high performers and high potentials," Noble explains. "Each seller does the certifying in their best area."

The onboarding program is split it into five phases—prospector, apprentice, data scientist, journeyman, and master—to keep new employees engaged throughout the 12-week experience. Each phase includes weekly self-practice and a mentor interaction that enables participants to demonstrate comprehension of what they have learned.

At the end of each phase, participants take part in a skills demonstration with their manager or an expert to determine their readiness to move on to the next phase. Not everyone progresses at the same rate, but through feedback and mentor and manager involvement, new sales employees get the development they need to be successful.

### Increased efforts and efficiency

After organizing the onboarding program into five phases with the Rock-It Moments, the company saw immediate and sustained success. The goal of the revised process was to decrease call reluctance, reduce testing anxiety, improve competency, and increase production in the first 90 days.

During the previous onboarding program, new sales employees began their first calls in week two with limited knowledge of their buyer's role in the organization. In contrast, the new onboarding program helps them understand the complexity of the software to better sell it.

Employees who completed the new onboarding program averaged 100 more calls in their first full week of making calls than those who started calls in the second week with the original onboarding program. The company also saw a decrease in demos scheduled with prospects who were not an ideal customer for the software.

After collecting insights from sales employees who were in their first 30 days of onboarding, the company found the feedback to be unanimous: Employees said it gave them more time to learn about the buyer, how to sell, and what engagement means before making calls; it also increased confidence in 100 percent of new employees.

Productivity is crucial for any sales employee, and Quantum Workplace communicates with new hires what their expected key performance indicators for their first 30 days are and then revisits the KPIs once the employees pass their final test. One of employees' initial KPIs is their rate of effectiveness, which is a ratio of connected calls to scheduled demos. New employees who went through the new onboarding program had a 6.5 percent increase in effectiveness compared to those before them. In addition, there has been a 17 percent increase in the ratio of demos set to demos completed, another KPI on which new sales employees are measured.

Using the LMS, the company also tracks course scores in the onboarding path. Quiz scores increased by an average of 34 percent, with 50 percent of new employees achieving 100 percent on the lessons covering the six phases of the company's sales process. Those numbers illustrate that stretching the learning out and enabling employees to progress at their own pace has been effective.

In addition, by analyzing mentor interactions, Quantum Workplace determined that all employees are able to identify the ideal customer's target industry, company size, and business title. That means employees have the knowledge to be more strategic with their prospecting and not hinder their progress.

## Remain agile and get back to it

Initially, new sellers began making cold calls after two weeks, delivering insights to high-level executives. By extending the onboarding program and delaying buyer connections from 30 days to 90 days, Quantum Workplace could cover the information that matters, in the right order, and create a more confident seller. It was crucial that employees were also immersed in the culture and felt supported by their new team.

The company collects employee feedback formally at 30, 60, and 90 days of employment to measure the onboarding effectiveness beyond competency, and it uses the feedback to stay agile and adjust to its growing needs. In the past, the company separated the account executive and sales development representative onboarding, but it found that the roles' ramp-up was similar in the first 30 days, which prompted a change to combining the paths initially and significantly reducing resources and people hours.

Adding the new content to increase awareness and understanding of the buyer resulted in employee competency increasing drastically. At the same time, the company concluded that learners need a brain break from all the new information, so it instituted one non-training day each week. That free day gives new employees the ability to see what a typical day looks like in their role.

Quantum Workplace also learned that employees needed a simplified communication method for their onboarding. With offices in Omaha, Nebraska, and Denver, Colorado, and remote workers across the US, effective communication is vital. An Excel spreadsheet gives employees an idea of what each day entails, what onboarding phase they are in, their upcoming Rock-It Moments, and what they need to focus on or review.

That simple solution prevents confusion and anxiety of not knowing what to expect and makes new sales employees the driver of their onboarding journey.

## Continued onboarding success

The sales team at Quantum Workplace grew by 40 percent in 2019 and continues to experience rapid growth. As a smaller organization, the need for formalized training is low, but without it, the company had experienced longer ramp-up times for new sellers. To support its aggressive revenue goals, the company needs to continue setting up the newest sales employees for success right away.

Quantum Workplace's next steps for sales training will be to resolve current feedback to make the onboarding program better for future employees, including a focus on improved communication. Through continuous feedback and continued measurement, the company can assess onboarding success and begin to create a smoother promotion experience.

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**Quiz scores increased by an average of 34 percent, with 50 percent of new employees achieving 100 percent.**

# Get in Sync

Accelerate strategy execution with a method to align all employees with the plan.

BY MARY LEGAKIS ENGEL

IMAGE | SAEMILEE/GETTY IMAGES

Your employer has developed a strategic plan. It's fantastic. It's informed by solid analysis of the market and competitive forces; an honest review of the company's competencies, strengths, and weaknesses; and a clear and defensible set of initiatives designed to propel the organization into an inspiring future. The strategic plan is a work of art. It is beautiful. Even the consultants your organization hired to help with it think so.

Why, then, is no one executing on it as quickly as they should?

That was true for one technology company based in Toronto, Canada. A solid and smart leadership team with strong opinions was being paralyzed by a decision-making process that could best be dubbed as management by committee. The leaders knew where they wanted to go, but they just weren't getting there.

Many strategic plans face the same fate as any standard project: They fail before they even begin. Inherent in strategic planning is change—and change management is a highly elusive yet important part of strategy execution. Failure to execute means unrealized opportunity and, in some cases, failure of the business as a whole.

The 60-person Toronto tech company embarked on a well-planned and facilitated three-stage process of executing change that aligned the organization within three weeks and had it executing its strategy immediately after that:

1. Communicate the change.
2. Let people absorb the change.
3. Engage people to shape the change.

Three years later, the company had doubled its revenues, increased in size to more than 150, and achieved its highest-priority objectives and strategic initiatives.

The method the firm followed is one that organizations of any size can implement. In fact, it has been deployed at businesses from small startups to international banks.

## Communicate the change

Once a company develops its strategic plan, it needs to tell people about it—over and over and over again. This is where marketers understand things best. Marketing professionals well understand that to get any prospective customer's attention, you must reach out to them at least seven to 12 times in different forms.

The tech company employed a multifaceted approach to communication that involved a combination of ideas.

- Hold a town hall discussion with the CEO: Invite your company's CEO to tell it in their own words.
- Leaders talk about the plan in their regular team meeting: Ask each leader to take ownership of the change by giving them talking points to raise in their meetings with direct reports.
- Include messaging in the company newsletter: Describe the changes in any written communication that goes out to employees.
- Post content on the intranet: On the pages employees visit regularly, highlight the specific changes and who is affected.
- Employ other communication methods: Develop and disseminate videos regularly and initiate chat messages through whatever messaging platform your employee base uses.
- Hold team planning retreats for each team that the change affects: The first portion of the event should be focused on communicating and understanding the strategic plan.

After strategy execution started, the tech company used all the above methods to communicate quarterly updates on progress against the plan.

### Absorb the change

Quite possibly the most underestimated part of a communication process is the organization enabling employees to absorb the change. After any communication, the standard question from the communicator often is: Do you have any questions? The standard response to that question often is silence.

To generate questions, leaders must first give employees a chance to understand how they feel about the change. To do that, they should ask employees a different question: How do you feel about this decision, change, or strategy?

Asking employees how they feel forces them to think about the gaps in their knowledge about the strategy. When they experience those knowledge gaps, they will know what questions to ask before they can explain how they feel. It may sound something like this:

*Leader:* "How do you feel about the change?"

*Employee:* "I'm not sure. This is the first time I've heard about it. Why was that particular decision made?"

*Leader:* [Describe the rationale.]

*Employee:* "OK. Now that I understand it better, I feel …"

The reason absorbing the change is dramatically underestimated is because people are not given the time to be able to express their feelings and concerns and to reveal the questions they may have otherwise realized they had. Most regular team meetings where leaders are expected to communicate the strategic plan and conduct other business last only 60 minutes. For a team of eight people, that leaves at most 7.5 minutes per person of talk time. That's hardly enough time to engage in meaningful discussion about a strategic plan, let alone generate enough buy-in and understanding of what needs to change to bring the plan to life.

The tech company allocated multiple team meetings and a team retreat to give every employee ample time to communicate their feelings about the change and ask the questions they needed to ask to realize what those feelings were. It enabled the organization to reveal areas of resistance, confusion, and incompleteness so that everyone could more easily buy into the strategy.

### Engage in the change

Finally, every employee needs to engage meaningfully in the change by redesigning their role to better align with the new strategy. While many HR or talent development teams will engage in a thorough organization design and job description review to align job roles to the new strategy, the tech company circumvented that traditional process by going straight to a revamped deployment of the objectives-setting process. It required the employees to recraft their roles. But instead of using job descriptions, they used scorecards to define metrics and objectives of each job that directly related to the new strategy—by far, the fastest way to implement the changes.

To start the process, the tech company's leadership team attended a retreat to determine the organization's key performance indicators (KPIs) for the next fiscal year based on the new strategic plan. During the meeting:

- Each leadership team member presented their own draft KPIs to the group to gather feedback and input on areas of interdependency requiring alignment.
- With a focus on the first fiscal quarter, the entire team developed an action plan for the major initiatives and identified the steps needed, with owners and dates assigned to each action.
- The team members talked about how they needed to change their behaviors, organizational structure, and

**Many strategic plans face the same fate as any standard project: They fail before they even begin.**

resources to best enable the strategic plan.

Each leadership team member then took the outputs of the retreat and led a retreat with their respective direct reports where they communicated the strategy and organizational KPIs and then worked on the team's KPIs together. During this team-level retreat, each direct report presented a set of draft KPIs for their role, and the team discussed action plans and other topics, similar to what took place at the leadership team retreat.

The team-level meetings cascaded to deeper teams in the company, where each team leader led a retreat during which they described and gained buy-in to the strategy and aligned their team to the strategic plan. At each stage of the cascading process of retreats, the leadership team uncovered and came to an understanding about the alignment issues that surfaced through the deployment and resolved discrepancies in the objectives and resources.

Short alignment meetings among the leadership team are an effective way to discuss and address any alignment issues. With the help of a main facilitator who has an understanding of the themes from all the retreats, the group should review the issues coming out of the employee retreats; decide on any changes needed to resolve the issues; and communicate the changes via a town hall, weekly team meetings, and the remaining retreats yet to be conducted.

Companies should repeat the above steps prior to the start of each fiscal year of the strategic plan.

Each retreat, ideally held offsite, could last anywhere from one to 2.5 days in the first year of deployment. The basic agenda would include these activities:

- Review and discuss the strategic plan (absorbing the change).
- Define the team's collective objectives (which represent the team leader's objectives for the period).
- Define each team member's objectives.
- Decide the team's key initiatives for the next period.
- Set an action plan.
- Discuss team operating norms.
- Identify roles and responsibilities relating to decision making, projects, and processes.
- Engage in a team building activity.

Because the retreats can be open to interpretation, an external facilitator or a well-trained internal facilitator should lead all retreats across the organization. Doing so ensures true buy-in and commitment to the decisions, consistency of the approach, and discipline to ensure each step is conducted without compromise. The facilitator's role also is to train each team leader in effectively leading a retreat, which results in an increased leadership skill set across the organization.

This series of retreats can take anywhere from one week to three months each year depending on company size. At the end of the process, companies will want to achieve three key outcomes:

- All employees understand exactly how their roles need to change to support the strategic plan.

**Everyone knows what they need to do, who they depend on to do it, and by when it needs to be done.**

- The company resolves all gaps, overlaps, and interdependencies between roles within and across teams.
- Every team has a set of behavioral expectations related to how team members will interact with one another and across teams to ensure the strategy is executed.

## Talent development steps in

While the tech company hired an external facilitator to help implement the strategy execution process, the HR function led the internal operationalization of the alignment method. Any company's HR or talent development function can take on the tasks that the tech firm's HR team was responsible for:

- Set the schedule of communications and events.
- Craft the messaging and talking points at each stage.
- Standardize a retreat agenda for every team.
- Schedule all the team retreats in coordination with the external facilitator. (The tech company eventually conducted train-the-trainer sessions in subsequent years to deploy internal facilitators.)
- Facilitate the retreats and alignment discussions.
- Document and track every team's meeting output and the employee objectives resulting from the retreats.

## Benefits

At the core of strategic planning is a set of decisions that need to be implemented. Management guru Peter Drucker said, "The first rule is to make sure that everyone who will have to do something to make the decision effective—or who could sabotage it—has been forced to participate responsibly in the discussion. This is not 'democracy.' It is salesmanship."

By using the alignment method, the leadership team compels all employees to participate responsibly and, by doing so, reveal areas of resistance. The leaders will be better able to address the resistance if they know where it is.

The alignment method also creates efficiency by removing conflict. An effective alignment method enables every employee affected by the change to create a set of objectives that are aligned across the organization. It effectively removes silos.

In addition, the method enables companies to accelerate execution because everyone knows what they need to do, who they depend on to do it, and by when it needs to be done. In essence, the alignment method front-loads the planning process, focuses resources on the right work, and removes inefficiency so that execution is accelerated.

## Put in the time and effort

Why do strategy execution efforts fail? Often because organizations underestimate the amount of communication and engagement required to build commitment and buy-in to a strategic plan. Companies comprise a diverse set of opinionated personalities, each with a different risk tolerance to change.

Convincing strong-willed people to change their ways can require a Herculean effort for which most organizations don't have the patience or discipline. The Toronto tech company didn't have the patience or bandwidth to fail on its strategy execution, so it hired a skilled facilitator to work with the HR function to ensure every retreat was well executed and efficient. The HR function then integrated the process with the performance management process to ensure effective feedback, coaching, and rewards were in place to support discipline and execution of the plan.

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# Connect the Dots

Use business impact mapping to demonstrate the chain of events through which learning improves business outcomes.

BY ALLAN BAILEY AND LYNETTE GILLIS

IMAGE | ADOBE STOCK

All talent development professionals would like to think that their learning programs have an impact on business success. But do the programs really affect strategy and bottom-line results? Is the TD function really moving the needle?

Probably not. Indications from a host of studies, including our own half decade of research, sadly seem to suggest that training strategies may have little impact on the business.

That bleak assessment is echoed in the 2019 McKinsey article "The Essential Components of a Successful L&D Strategy," which reveals that "Only 40 percent of companies say their learning strategy is aligned with business goals. For 60 percent, then, learning has no explicit connection to the company's strategic objectives." The Association for Talent Development report *Effective Evaluation: Measuring Learning Programs for Success* concurs, revealing that only 40 percent of TD professionals believe their organizations' "evaluation efforts were effective in meeting business goals."

But there is good news: There is plenty that TD professionals can do to nurture a more results-based culture and ensure training is laser focused on priority business outcomes.

## The anatomy of failure

We learned the bitter truth about training's chronically poor performance in the course of our five-year rigorous evaluation of some two dozen training programs in firms such as Boeing, Logitech, Business Development Bank of Canada, and WestJet airlines. The goal of the research, sanctioned by the Government of Canada, was to encourage greater national investment in training by demonstrating its positive impact on the balance sheet.

The study outcomes were a bombshell. Despite the fact that organizations had been recruited into the study based on their own convictions that their learning program would yield positive return on investment, more than half failed—instead receiving negative ROI.

But we learned much from failure. Because all programs were evaluated in a uniform, systematic manner, we received rare insights into the anatomy of failure—what works and what doesn't. Our poststudy analysis revealed that most failing programs shared several flawed practices in common.

The number 1 reason for failure? Lack of alignment.

In study after study, we found the same puzzling lack of consensus among key stakeholders about the learning solution's primary goals. Frontline managers, senior leaders, training developers—each key player seemed to have completely separate notions of the program's main purpose. It comes as little surprise, then, that so few achieved success.

Those lessons learned triggered an effort to develop techniques to help organizations improve impact. One approach is business impact mapping, which gives organizations a quick and easy-to-use technique to ensure training initiatives are connected to business needs.

Our approach, evolved from Robert Brinkerhoff's pioneering work, helps get all players on the same page and creates a clear line of sight between the training solution, job performance, and business outcomes. We are convinced that business impact mapping would have sharpened the focus and greatly enhanced the impact and ROI of every one of our study programs.

Unfortunately, the technique of connecting the dots for outcomes is a critical procedure missing from standard instructional design practice.

## Components of an impact map

Impact mapping gives developers a powerful new tool to gain consensus. It becomes the road map—a high-level summary of desired results at three key program junctures (the learning value chain): capability, job performance, and organizational outcomes. It answers these questions:

- What knowledge, skill, attitudes, and intentions will participants acquire as a result of participating in the training? (capability)
- How will this affect their workplace performance? What new skills will they display? What actions will they take? How will things change? (job performance)
- How will the organization benefit? (organizational results)

Figure 1 shows a typical impact map developed to diagram the chain of outcomes ensuing from a training program for call center support training. The map was developed through a consensus-building process involving representative stakeholders—for example, instructional designers, line supervisors, and senior division or department managers.

The first column lists the skills and knowledge (capability) support agents should acquire as a result of the training program. In this example, the capability link includes a blend of product knowledge, customer service skills, and call management skills, such as awareness of when to escalate issues to the secondary level.

The middle column describes the key job performance outcomes program developers expect to observe once participants are back at their jobs: more accurate and timely problem diagnosis and call escalation.

Finally, because of improvements in job performance, it is hoped the training program will have an impact on organizational results. In our example, some of the results are tangible—that is, they are easy to track, measure, and convert to monetary value. Here, tangible outcomes include reduced call-handle time and more efficient use of secondary-level agents. The map also

### Figure 1. Impact Map for Call Center Training

| CAPABILITY | JOB PERFORMANCE | ORGANIZATIONAL OUTCOMES |
|---|---|---|
| **At the end of training, participants will have gained greater ...** | **The transfer of capability to the job will result in ...** | **If job performance outcomes are achieved, the resulting benefit to the unit or organization will be ...** |
| ▪ knowledge of the Acme Universal Home Controller<br>▪ active listening skills (understanding of the listen-clarify-check technique)<br>▪ understanding of key techniques to handle frustrated, confrontational callers<br>▪ knowledge of how and when to escalate the call to the secondary level (agents with greater expertise). | ▪ quick and accurate diagnosis and resolution of customers' problems<br>▪ enhanced customer rapport (quicker resolution equals reduced customer frustration)<br>▪ reduced job stress<br>▪ faster call escalations to secondary-level support<br>▪ fewer inappropriate call escalations to secondary-level support. | **TANGIBLE**<br>▪ increased productivity<br>▪ reduced call-handle time (time saving)<br>▪ enhanced efficiency in call-escalation practices—i.e., more efficient use of secondary-level agents (time saving).<br><br>**INTANGIBLE**<br>▪ increased customer satisfaction (greater satisfaction with contact experience, increased satisfaction with product experience)<br>▪ increased employee engagement<br>▪ lower stress equals lower turnover and enhanced retention. |

identifies intangible outcomes, such as improved customer satisfaction and employee engagement.

## Conduct a mapping session

The mapping process works best when the design team takes ownership of the process and produces a rough draft of what outcomes they hope the program will achieve. The key point here is that the design team is not wed to this draft; it is just a trigger to begin the conversation with the stakeholders.

We've learned an important lesson from conducting literally hundreds of focus groups and mapping sessions: Groups are quick to engage if they have something to critique. In comparison, asking them to generate ideas on their own from the ground up is a steeper challenge and takes a great deal longer. The design team will cover more ground more quickly if it starts with a draft map for stakeholders to review.

Typically, the mapping session includes a small stakeholder group (three to six people) comprising instructional design and subject matter experts; managers or supervisors of the participant group; and a senior manager, program champion, sponsor, or client.

During the collaborative sessions, preferably conducted face to face, the group revises the draft outcomes, adding or deleting them, gradually building consensus on the essential purpose of the training and prioritizing program outcomes and alignment. We've found that the simple act of filling in those three columns with the right group around the table generates productive conversation almost as valuable as the map itself.

**The simple act of filling in those three columns with the right group around the table generates productive conversation.**

## Outcomes

While initially we developed business impact mapping to help groups clarify and align their training initiatives' key outcomes, we soon discovered there were many other ways mapping drives impact.

**Focuses attention on results.** Impact maps encourage a results-focused culture and more rigorous thinking about outcomes at all levels—learning, job performance, and the organization.

**Triggers the conversation with the business.** Attendees of past impact mapping workshops often report that the greatest value is in fostering more productive conversations with the business. Light bulbs go off as senior leaders shift perspectives and connect the dots between training and their critical success metrics.

For senior management, it's often their first time seeing and completely appreciating the full learning value chain. Following a series of pilot trials in one global Fortune 500 client, all business lines mandated impact mapping for all new programs.

**Invites productive dialogue.** These sessions also encourage stakeholders—program designers, line managers, and senior management—to discuss the value of training from their perspectives (or reconcile conflicting views). And as a result of this focused dialogue ...

**Gets everyone on the same page.** When groups find that they hold conflicting opinions—as often occurs—the session provides a process for resolving differences and finding consensus. For those at the table, it may be the first time that they come to see the training solution from the others' points of view.

Importantly, the mapping session often deepens the design team's insights into what senior management really wants from the training initiative. For frontline managers, it's an opportunity to share their views on how workplace behavior needs to change—what's appropriate, practical, or even possible. It's an essential reality check on what may work and what won't.

There are few activities in traditional course design that so effectively occasion this synergistic dialogue among diverse stakeholder groups.

**Lays essential foundation for evaluation.** Impact mapping informs what will be evaluated (key indicators), at what levels (links in the value chain), and when (timing of data collection).

**Retains the big picture.** In complex projects, it's easy to lose sight of the big picture. Impact maps are evergreen documents that keep the big picture in clear view. For many of our larger clients, their impact maps serve as institutional memory. As staff and leadership come and go over time, the maps retain a vivid snapshot of the outcomes and rationale behind their original development.

**Reveals enablers and barriers.** Not surprisingly, the impact mapping session offers a rare opportunity to surface the enablers and barriers to impact at all links in the learning value chain—immensely valuable in-

## Figure 2. Barriers and Enablers

| CAPABILITY | JOB PERFORMANCE |
|---|---|
| **Enablers**<br>▪ Participants' managers attend a one-hour briefing session on the content of training and their role in promoting transfer.<br>▪ Training is offered on two work shifts to accommodate varying work schedules.<br>▪ Participants are carefully screened to ensure that they have the prerequisite knowledge and skills to benefit from training. | **Enablers**<br>▪ Participants are given "protected time" to integrate their newly acquired skills on the job.<br>▪ Participants' managers hold a debriefing session with participants to discuss projects where new learning may be best applied.<br>▪ A post-training session is held with participants to discuss and resolve any problems they may be encountering when using the new skills in their jobs. |
| **Barriers**<br>▪ Managers will be reluctant to send participants to training in view of recent budget cuts.<br>▪ Some regions lack well-trained facilitators. | **Barriers**<br>▪ Performance improvement is not currently tied to bonus and incentive plans.<br>▪ Training lacks follow-up job aids or reference material to provide participants with additional help on the job. |

formation for enhancing or achieving intended results (see Figure 2). The collective wisdom of the stakeholder group sheds light on the key factors—unique to the learners, timing, and organizational culture and context—that can make or break the initiative's success.

The left column of Figure 2 identifies factors at the capability link that could help boost the transfer of knowledge and skills to job performance, such as manager awareness and work shift flexibility. The risks to transfer (barriers) also are listed.

### A clear and simple road map

Impact mapping is a process streamlined for the speed of business. With the right stakeholders around the table, they can create maps in a matter of two to three hours. When we first began teaching the technique, we were often surprised by participants who had already completed a draft map by the end of the session.

Once created, the impact map clearly and simply—in a page or two—describes the primary program intent for all audiences in the organization. The map is a high-level document that is easy for anyone to read and understand. Some groups use their maps to market their programs, aptly describing their potential benefits. Others attach the map to budget requests or share it with vendors for course development or acquisition. Sometimes TD teams share the maps with training participants, participants' managers, and course facilitators to align everyone involved with the program's goals.

Our five years of ROI research made one thing abundantly clear: The path to success begins with a good—clear and simple—road map. Had it been available at the outset for our research partners, we believe impact mapping would have helped many of the participating firms avoid failure.

In the standard instructional design process, however, this critical technique or element is woefully missing. While designers (ourselves included) generate mountains of design documents, typically absent is that single page that succinctly depicts the line of sight from training to job performance and business results. And, ironically, that is the one page senior management most wants to see.

Without that consensus-driven sight line, designers and developers often assume their training solution is aligned to business outcomes, when, in fact, this crucial alignment may be weak, inaccurate, or most likely altogether lacking. And senior stakeholders, without this strategic road map, will arrive at their own conclusions about the training initiative's value—or worse yet, fail to see any value at all.

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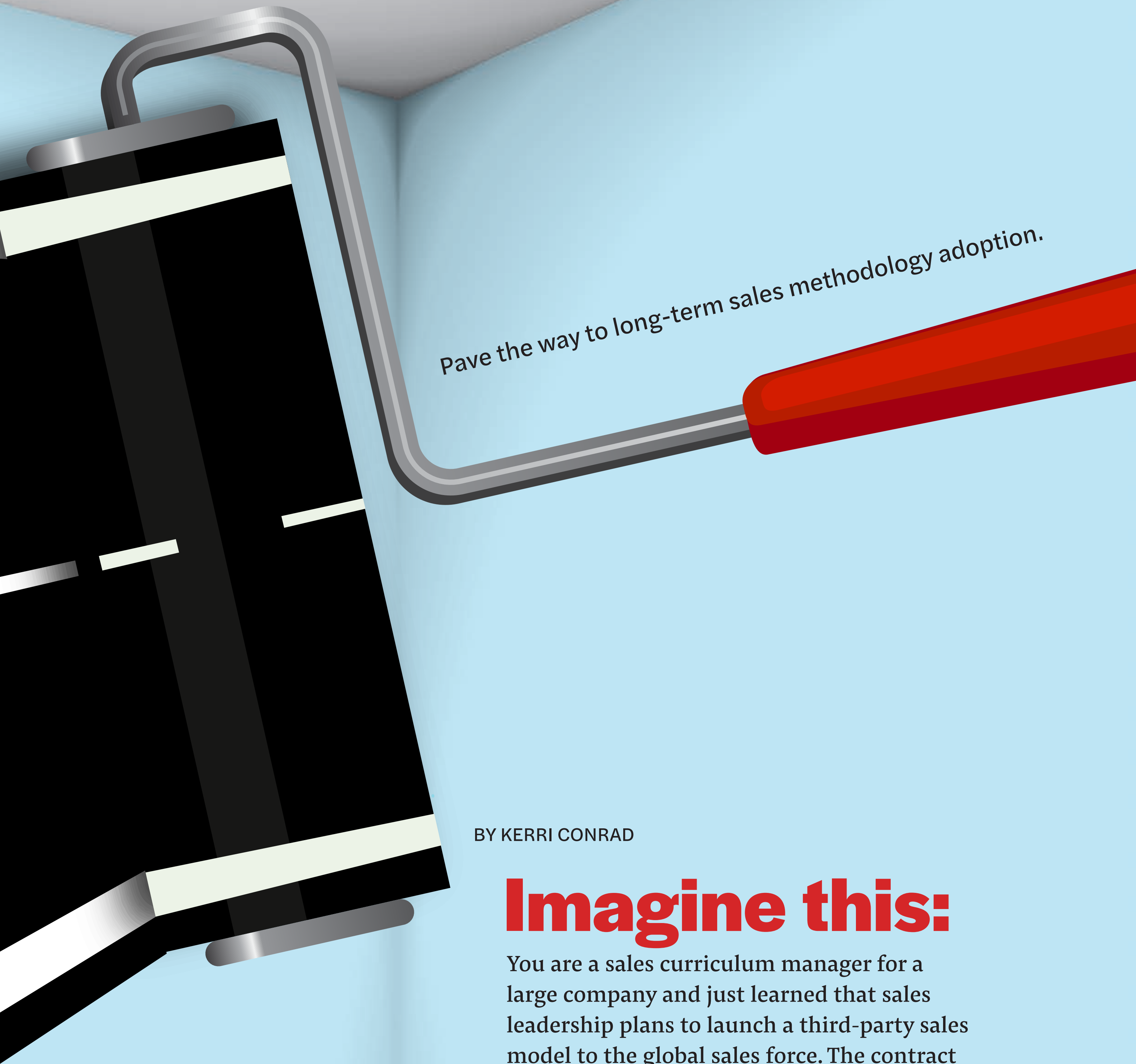
# ROLLOUT READY



Pave the way to long-term sales methodology adoption.

BY KERRI CONRAD

# Imagine this:

You are a sales curriculum manager for a large company and just learned that sales leadership plans to launch a third-party sales model to the global sales force. The contract will be signed in a few days. The vice president of sales operations has asked how quickly you can schedule the workshops and load the prework into the learning management system. You are sure you can add a higher order of value, but you aren't sure where to start.

IMAGE | ADOBE STOCK

Don't wait for someone to ask for your input about driving adoption. Be proactive. Create a plan you can share with key stakeholders for consideration and feedback. And, of course, partner with those stakeholders to implement the revised plan.

This article is based on firsthand experience from the customer side of multiple large-scale sales methodology rollouts, each with a different sales performance vendor. Even if you're not a sales curriculum manager, the guidance is relevant to anyone who has some degree of responsibility to help their company garner results from a sales training rollout.

## Get started

Let's say the unexpected happens, and the vendor is under contract to provide postworkshop support to help drive adoption of new sales behaviors. Do you still play an important role? Yes; it's impossible for an outside vendor to see the same opportunities you can.

At its core, sales methodology is a business process that touches many functional areas, including marketing, talent acquisition, customer relationship management, and other business systems. Some areas will support the methodology rollout and have their own adoption plans, so find out who those people are, how the plans align, and the opportunities for collaboration. That cross-functional approach can bolster and organically grow your long-term adoption plan.

## Build a relationship with the vendor

The vendor is a central player in the rollout beyond the workshop delivery. Its team has been talking with your sales leadership stakeholders, sales managers, and sales training audience about their training needs, and it will continue to do so for some time. Your employer has placed its trust in the vendor, as well as significant dedicated funding. The faster you can develop a relationship, the better. Exchanging insights can evolve into a powerful, collaborative alliance that will factor heavily into your adoption plan.

If someone from your sales organization hasn't already connected you with the vendor team, find out who is managing the relationship and ask for an introduction. Explain that your goal is to align the company's internal sales training to the new methodology where possible and that you would like to get the vendor's insights.

## Learn About the Vendor

Before you speak with the vendor, do some homework that will help make the most of the rep's time and yours. Here's what you should learn in advance:

**What is the vendor's perspective on sales success? What are the critical skills and attitudes that can make the difference between a mediocre salesperson and a top performer?**

An online search and visit to the vendor's website will give you a good head start on those answers.

**Why did your company choose this vendor and sales model over others? What sales behaviors is your company seeking to change? How is this vendor and the chosen solution uniquely suited to help effect those changes?**

The people on the vendor selection team—or colleagues who can speak on their behalf—will be the best source of information for answering those questions.

YOUR GOAL IS TO ALIGN THE COMPANY'S INTERNAL SALES TRAINING TO THE NEW METHODOLOGY WHERE POSSIBLE.

Also see if you can audit one of the vendor's workshops. Observing a workshop is on the critical path to developing an effective adoption plan. The methodology workshop is an opportunity for you to understand what content the instructor emphasizes, where learners struggle, and how the instructor answers questions and explains main points. Simply reading the training materials will not provide that knowledge.

## Create a revision plan

It's important to align your sales curriculum to the new sales model. Without alignment, the salespeople will face several mental hurdles each time they take one of your courses.

So, what will you need to adjust in your regular sales curriculum? The answer will be unique to your organization and the sales methodology, but here are three givens: lexicon, principles and techniques, and emphasis and proportion.

Begin by comparing your current sales training template to the new methodology. That will require a bit of homework and a step-by-step approach. First, document your typical sales training approach in a way that will be easy for the vendor to understand. Listing the modules in sequence enables others to see at a glance what the course generally covers. If the module titles aren't descriptive, use graphic phrases in place of the titles.

Next to each module, give a percentage that indicates the proportion of the course dedicated to it. For example, topics and weightings for a course may look like:

- market opportunity (why salespeople should be excited)—5 percent
- customer needs—10 percent
- solution overview—30 percent
- prospecting/where to hunt—10 percent
- developing the opportunity—15 percent
- why us versus the competition—20 percent
- customer success stories—10 percent.

After making that list, provide a summary of what each module typically entails. What are the learning objectives, keywords and phrases, learning activities, and sales techniques per module? You are basically creating a snapshot of your company's current sales lexicon and approach. The goal is to give the vendor a picture of what your sales courses commonly cover and how product information balances with sales techniques.

Now review the methodology and note key differences. Document your initial thoughts on how you will need to adjust the sales training to mirror the new methodology. For each module, document a revision plan. For instance, the second module of your sales courses has traditionally included an elevator pitch for a given solution, but the new methodology uses the term *attention-getter*. Therefore, make a note in your revision plan indicating that *attention-getter* in module 2 replaces all instances of *elevator pitch*. If you want to include a job aid on how to construct and deliver the attention-getter, write that down as well.

Walk the vendor through the revision plan to collect feedback. Start with your template or course snapshot to provide context for planned changes. Give the vendor a few days to reflect, then have a follow-up meeting to collect input. During that meeting, get the vendor's explicit approval for any new learning collateral—cheat sheets, learning activities, or other supplemental materials you'll need to develop to leverage the vendor's intellectual property.

Once you update your documentation with the vendor's guidance, you will essentially have an aligned sales training template. Be sure to update your revision plan. As you will see in the next section, it will become a key learning reference.

### Coach training designers, developers, and SMEs on the new method

At this point, you are prepared to help other team members make the necessary mental shift to the new approach. Stakeholders can include instructional designers, technical writers and editors, project managers, and content subject matter experts.

For some SMEs, the shift will be difficult; they are accustomed to being the masters of their content and may resist change. Other SMEs will be excited and appreciate your guidance to ensure their content stays fresh and in step with the sales organization's evolution.

To quickly get everyone up to speed, consider holding a workshop with the cross-functional team to guide members through revising an existing course to align with the new format. Select a strategic course that will have a long shelf life so it's worth the effort of updating it. Spend time reviewing the revision plan with them so they get a sense of important changes, module by module.

Now is the time to rename the revision plan to reflect the new purpose of the document, which, to put it plainly, is to help team members understand what they need to stop and start doing when developing a sales course.

### Provide training tools for sales managers

Even though sales managers will learn the sales methodology and likely receive additional training on how to coach to it, you can bolster their efforts to help their salespeople internalize and apply their new sales skills. Something that has worked well for me in the past is to provide "training in a box" that sales managers can easily deliver on their own during routine sales meetings or quarterly business reviews.

I partnered with a sales manager to zero in on one type of business challenge the sales team needed to tackle. Next, I developed these deliverables for the manager to use with the team:

- a short PowerPoint presentation (no more than three slides) that the manager uses to refresh everyone's memory of a specific technique from the methodology
- a template to help each salesperson draft an approach for leveraging that technique with a specific prospect or customer
- a commitment sheet, where each salesperson pledges to use the technique with that specific customer within a specific timeframe and report back to the rest of the group on results.

The sales managers who used that approach reported that it was an effective management tool for them and made a measurable difference in sales productivity and performance. Benefits included more efficient customer meetings due to conveying essential messages more effectively the first time, increased ability to break into new accounts, faster identification of influencers, and increased deal size due to selling more complete solutions versus point products.

### Talk with sales leaders about partner training needs

It's inevitable that leaders and managers of the indirect channel will ask how partners will be trained on the new methodology. Refer them back to the sales leader who purchased the training method so they can discuss the business need. No one should share the vendor's training with a partner unless the vendor has given written permission to do so. Otherwise, that would be considered eliminating a workshop opportunity for the vendor, thus threatening its revenue stream.

However, some vendors are open to negotiating unique arrangements that are mutually beneficial. The key is to draw a clear distinction between using some new sales techniques with a partner in the context of pursuing a joint sales opportunity versus attempting to train the partner on the methodology itself. Consider which job aids blend the vendor's techniques with your company's content.

Let's say sales team members are working with a partner on a specific opportunity, and they are at the stage of discussing return on investment. In such situations, I have created a mock-up of the job aid and included joint branding between my employer and the vendor, along with a URL to the vendor's website where the partner can go for more information. The vendor was pleased with that free marketing approach and didn't charge my employer a fee for sharing the job aid with the partner. Our arrangement was on a case-by-case basis; we didn't treat it as blanket permission to distribute to our partner base.

### Prepared for success

If you are supporting a sales methodology rollout, you are bound to identify many additional opportunities to remove the barriers to adoption. In fact, you may have noticed a key topic I haven't yet discussed: onboarding training (in other words, sales boot camp) for new sales hires. How can you successfully integrate a sales methodology into a sales boot camp? Is a stand-alone methodology workshop still needed? If you have dedicated in-house sales trainers, what are the pros and cons of certifying your own sales trainers to deliver the methodology?

By following the guidance I've outlined, you will be better prepared to address those and other questions as they arise. For example, you will have a head start on transforming sales onboarding training if you have already transformed your standard sales training template and created a new set of sales job aids. And if you already have a good relationship with the vendor, discussing new challenges—such as how to evolve your sales boot camp—will be an easy extension of your ongoing collaboration.

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## Learn From the Vendor

After setting up time to meet with the vendor, have these questions (listed in order of priority) on hand to ask the rep directly.

1. What main behavior changes are you trying to effect through this rollout? Why have those changes been deemed critical to the company's success? What is the magnitude of the skills gaps?

2. Can you provide a set of the training deliverables the target attendees and their managers will receive so I can start coming up to speed? (If there's a fee for the set, it's worth the price. Some vendors will have books on the commercial market, but they aren't a substitute for seeing the training materials. Generally, such books don't include job aids, role-play activities, or other useful training staples.)

3. Do you have any recommendations on how someone in my position can best support the rollout and help drive adoption of the methodology?

4. Do you have examples of how other customers have adapted your ongoing sales training to the new methodology?

5. Is it possible to speak to a training peer from one of your company's customers for firsthand lessons learned and best practices?

# What Continuing **Education** Knows About the **Business of Learning**

BY TRACY KING

Trade associations offer a bounty of learning options, so glean insights from these organizations' education programming strategies.

IMAGE | ADOBE STOCK

Siu rested her headset on its charger as her virtual seminar cohorts blinked off the screen. It was exciting to have been selected for her company's emerging leader program; learning alongside talented colleagues across the organization's North American operation was truly insightful. Today's session on leading through crisis revealed a skill area she wanted to strengthen as she grows toward one day leading a public relations division. As she scrolled through the options and curated content in her company's learning management system, nothing quite hit the spot. She toggled over to the Public Relations Society of America website to see what her professional association had to offer. Bingo! She bookmarked a few options to explore on the commute home.

Siu's continuous learning challenge is one many professionals share: to continuously polish job performance while bridging new opportunities with knowledge and skill development. Outside the corporate LMS, there is a universe of professional development options operating in the business-to-consumer continuing education market. While informal online resources and formal programs from academic institutions readily come to mind, another powerful partner in the professional development space is professional associations. And there's plenty that talent development professionals can learn from them.

In addition to conferences, associations offer a rich portfolio of courses, seminars, webinars, e-learning, certificate programs, and certifications to assist professionals in their career growth. Association education programs commonly offer credit toward maintaining industry credentials and ascending competency mastery. But because participation in the programs is voluntary, associations must position them within a competitive market. As a result, accomplished associations have developed savvy acumen in the business of learning, motivating adult learners to persist in their professional development.

Associations' unique perspectives on learning management and design can inform our practice.

## Education strategy

An education strategy in business-to-consumer continuing education directs programming for a spectrum of professionals from the professional pipeline through career maturity within a specific industry. An association's education strategy begins with defining its constituencies, what problems the organization can solve for them through learning, and how its portfolio of programs will address those issues in the coming year. Key performance indicators track business goals (such as revenue, market penetration, and professionalization of the workforce) and portfolio performance (efficient production, program use, and controlled cost) in addition to learning—measuring that participants achieved the result they paid for. Let's take a look at three key insights.

**Market focus.** Maintaining a market focus requires continuing education providers to cultivate multiple channels for detecting emerging needs within their industries that they can address with programs, products, and services. But this is much larger than a needs assessment.

To remain competitive, trade associations must harness this data to predict a progression of needs for their learner constituencies so they can offer novice to master learning lattices. Not only is this a service to the industry they represent, but it's also required to generate the "this is for me" response that triggers prospects to enroll, purchase, complete, rate, and recommend programs to others.

*Consider:* How can talent development professionals map a progression of needs using the required and elective learning opportunities we offer?

**Measurable goals.** We're no stranger to metrics and performance indicators in training and development, but more often than not, our measurement focus is from the learning program perspective. Managing a successful portfolio of continuing education programs requires organizations to craft metrics that express the role of education holistically in achieving their vision and mission. That shifts the perspective from "How will this individual course meet its program goals?" to "How do our strategic goals inform how we assign roles to programs within our learning portfolio to work together and execute upon our vision effectively?" Strategic alignment increases collaboration between programs and decreases competitive grabs for internal resources.

*Consider:* From a strategic lens, which among our courses and curated resources could be aligned to achieve a greater outcome for the business?

**Multiple touchpoints.** Part of strategic program deployment is identifying content priorities for the coming year and how programs within the learning portfolio will carry the ball forward, extending the learning from invite to application. We know from the literature that what happens after a formal learning episode is vital for generating outcomes as we support try-and-refine application behaviors that integrate new practices. Two common approaches are to curate postcourse touchpoint materials and design learning pathways.

A sample learning pathway incorporates before, during, and after content touches to prime learning, deliver training, and reinforce behavior. Touchpoints may be comprised of a series of microlearning, practice support, troubleshooting conversations to navigate application obstacles, or cohort check-ins. Not all the components that learners accessed have to be measured; what's important is measuring whether participants achieved competency.

The implications of operating a portfolio of learning versus a collection of learning programs isn't solely deeper strategic outcomes.

*Consider:* What criteria or decision-making rubric does the talent development function employ to determine education priorities for the coming year? Are there opportunities to consistently employ pre- and postcourse touchpoints to deepen outcomes?

### Portfolio perspective

A portfolio of learning comprises all the ways an organization delivers training to achieve desired outcomes. Each program within the portfolio has an assigned role to play in achieving the organization's strategic objectives, individual program goals, and learning goals. It's like a recording studio mixing board—each content channel may be dialed up or down in service to the outcomes. While one learning initiative may crank up the entire board, another may achieve its goals with less.

Learners align with a professional association when they can see their desired future reflected in the program outcomes.

When centralized with a portfolio perspective, resources are assigned in alignment with the goals laid out in the strategy, which maximizes efficiency and decreases the competition between programs for executive attention or budget dollars. It requires a broader collaboration and teamwork toward shared results, surpassing what we could achieve by managing individual programs with their individual compasses.

**Expanded capacity.** The implications of operating a portfolio of learning versus a collection of learning programs isn't solely deeper strategic outcomes (which is an amazing result); it's also expanded L&D talent capacity. Think about the redundancies of effort and resources alone when training programs are designed, delivered, and maintained as separate units instead of an integrated learning portfolio. What shifts in talent capacity could you imagine if new program intake was centrally managed and aligned with the go or no-go of the organization's strategic goals?

Also think about the synergies that could develop as programs within the portfolio partner. Aligned processes, coordinated resources, and congruent production calendars can significantly reduce the strain of emergency program requests. Sharing asset repositories and after-action review insights can shorten the distance from project discovery to completeness.

*Consider:* What could the talent development function accomplish with the expanded capacity afforded from operating from a portfolio perspective?

**Empowered efficiency.** Because learners are the center of our work, we expend a lot of focus on the performance of education technologies—and that is important. But a portfolio perspective also challenges us to ask about how we are using technologies, systems, and standards of practice to empower L&D efficiency.

Is it easy or challenging to access shared assets and tools? Are we spending hours (and money) in workarounds when a small investment in cleaning up permissions, hosting documentation in shared networks, or completing a sorely needed upgrade would significantly reduce waste? What rework could be prevented? What miscommunication could be avoided? When the talent development function embraces a portfolio perspective, it harnesses technology to remove barriers to team collaboration, which improves talent management as well as learning outcomes.

*Consider:* If you and your team could press pause on work demands for a week, what tech opportunities would you focus on to empower efficiency?

## Learning design

The secret to success in the continuing education market is designing for deeper outcomes. While the reputation of a trade association and experts presenting a program are a factor, it's ultimately the promise of transformation that sparks an individual's motivation to become a member, purchase a program, and invest time in the learning journey.

Business-to-consumer education providers position their programs knowing the market will comparison shop, particularly if participation is an out-of-pocket cost. That means learning programs must address a deeply felt need and deliver solutions so that when participants leave the classroom—whether physical or digital—they can be or do something new, better, or different.

Because this training won't be assigned or a required component of an employee's yearly performance review, market motivation and retargeting to continue

learning become factors in design. And it corresponds with the learning pathway framework.

**Before.** If an organization is operating a collection of programs, it's challenging for learners to sort and prioritize what they need to meet their career development goals. A portfolio of learning offers a coherent network of knowledge and skill development that addresses the predicted needs progression for the industry at present so professionals can quickly assess where they are in the journey and pick their personal starting point. Learners align with a professional association when they can see their desired future reflected in the program outcomes. They are primed to solve an immediate problem but also offer commitment through a registration transaction to take that greater journey.

*Consider:* Are there opportunities for talent development to network our content around both short- and longer-term development goals and clearly communicate those options to learners?

**During.** In business-to-consumer professional development, program experiences are designed to accomplish more than learning. Although advancing a career through learning remains the heart of it, other value propositions are at play.

Take a conference, for example. The buffet of learning options offers formats serving the entire spectrum of professionals in their career progression such as hands-on workshops for new-to-me topics, case-based sessions for professionals looking for novel solutions, and panel discussions for leaders who have mastered the content but are refining their practice. Room setup and conversation spaces suggest to participants the type of experience being offered upon them entering a room.

Note also how daily agendas are designed to facilitate peer networking and interactions with experts. Those events often are among the most valuable learning experiences reported in program evaluations. And throughout the experience, tiny touchpoints in the meeting app, on-site program guide, expo, or meal announcements introduce participants to next steps in their learning journey. All those dimensions are part of a plan for that conference to meet its strategic objectives while motivating professionals to continue learning with the association.

*Consider:* In addition to learning, what goals do we have for our training programs? How could we design to motivate those behaviors?

**After.** Together with formal learning pathways, curated learning pathways assist professionals in navigating professional associations' vast content and curriculum. They may take the form of programs tagged to an industry competency model or recommended resources within the association's digital library for discovery learning. It may be a facilitated conversation within a community of practice post-event or retargeting participants after a webinar about another program within the same interest area. It presents in the form of email reminders of free resources with membership and upcoming opportunities to engage with industry experts. It's a searchable job aid repository for point-of-need access or a listicle of curated resources on a hot topic.

While trade associations plan and coordinate some of those efforts, other initiatives are responsive to an arising need. However, these organizations offer all of them to motivate professionals like Siu to press on in their learning journeys.

*Consider:* How could talent development professionals optimize all the rich resources we've created in formal and curated learning pathways?

## New lens, new insights

Although employees may not read reviews to decide whether they will participate in your company's training courses, looking at learning through a continuing education market lens offers interesting insights—and a challenge. How could strategic alignment within your company's learning portfolio streamline course production and deepen outcomes? What opportunities lay within the training collection to spark intrinsic motivation for continuous learning? Designing for mastery should remain the compass north for us all.

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Impostor syndrome can undermine your professional advancement and sabotage your career.

# Feeling Like a Fraud?

BY JASMINE AQUINO

I want you to consider submitting a presentation proposal for the next state conference," my supervisor told me. Was she kidding? I wasn't good enough to do something like that. I was surprised at her confidence in me, and I thought of all the reasons I shouldn't do it: I had never presented at a conference before, I was new to my role, I was too young, and everyone would think I was trying too hard.

IMAGE | ADOBE STOCK

Impostor syndrome limits people's beliefs in their own capabilities, and suffering from it can adversely affect career progression.

What if my proposal didn't get accepted? What if I failed horribly in front of the entire profession?

Nevertheless, I reluctantly submitted my proposal—and it did end up getting accepted, and my presentation garnered positive feedback from attendees. I was shocked. I had somehow fooled everyone into thinking that I was competent.

Looking back, I realize I shouldn't have felt that way, because I had years of education and experience. What I was facing was impostor syndrome, and I am fortunate I did not let it derail my professional development. Impostor syndrome can hinder career growth; however, individuals can take steps to overcome those negative thought patterns of self-doubt to achieve success.

## What is impostor syndrome?

Impostor syndrome, also known as impostor phenomenon, is a term psychologists Marie Rose Clance and Suzanne Imes conceived. It is the feeling of inadequacy even when there is clear evidence of achievement—the persistent internal perception of self-doubt and fear of being discovered as a fraud.

Impostor syndrome is not recognized as an official anxiety disorder in the *Diagnostic and Statistical Manual of Mental Disorders* (DSM-V). Rather, it can be considered a consequence of neuroticism, which is one of the five core traits identified in many personality models, such as the OCEAN model and the five-factor model. Neuroticism is defined as a tendency toward negativity and emotional unrest, such as anxiety and guilt.

Individuals who score higher on the neurotic spectrum may be more susceptible to impostor syndrome. Several additional factors can stimulate impostor syndrome, including low self-esteem and perfectionism.

## Who is likely to experience it?

Impostor syndrome manifests in various people for different reasons. Experts once believed that women and minorities were more susceptible to it, reasoning that because they have historically been grossly underrepresented, they already feel like outsiders. Continuously being exposed to feelings of inadequacy, those groups internalize the message they have been receiving throughout their lives and explain away their successes as mishaps, chance, or effort rather than actual skill or expertise.

However, additional studies—including research that Portland State University Professor Kris Henning conducted—have shown that impostor syndrome affects high achievers regardless of gender or ethnicity. For example, professionals such as scientists are more likely to experience it due to the highly competitive environment of their field. Additionally, those who work in an industry where the consequences of failure are significant, such as a clinical setting, also are more likely to have it.

Many sources contend that about 70 percent of the population will experience impostor syndrome at some point in their lives. With a culture of consumption and the exposure to social media, that really should not be a surprise.

Nailya Ordabayeva, an associate professor of marketing at the Boston College Carroll School of Management, argues that consuming luxury products can lead to impostor syndrome. She references that more than 80 percent of Americans are in debt, suggesting that too many are living outside their means. Purchasing luxury items, especially when people do not have the money to afford them, can lead to feelings of inauthenticity. Living on a champagne budget while only being able to afford tap water can make anyone feel as if they are posturing.

Social media only magnifies the problem. After all, when was the last time anyone posted a candid shot on Instagram? Between filters and editing capabilities and maintaining a personal brand, social media posts can feel like people are fabricating an extravagant illusion. This lack of transparency can leave people feeling like charlatans. Often, those feelings of guilt and shame turn into damaging self-talk, such as "I'm not good enough" or "When will I be exposed?" That combination of negative feelings and self-deprecating thoughts can indicate impostor syndrome.

## What are the effects on careers?

Impostor syndrome limits people's beliefs in their own capabilities, and suffering from it can adversely affect career progression. For starters, impostor syndrome can have a negative impact on productivity. Those who experience it often believe their success comes from effort rather than skill, so they will put in long hours to make up for their perceived inadequacy, which can lead to a failure to maintain work-life balance. That imbalance can lead to exhaustion, lack of sleep, poor health habits, increased stress, and irritability.

Overexertion for too long frequently precedes burnout, which can have undesirable effects in the workplace, including absenteeism and turnover, communication breakdowns, and an increase in errors or safety incidents. Making errors, communicating ineffectively, and even changing jobs frequently can all have a damaging impact professionally. Burnout can also instigate procrastination.

However, numerous factors can cause procrastination, several of which can be linked to impostor syndrome. Many individuals who experience it have been shown to be perfectionists, which can cause procrastination. They habitually set unrealistic expectations and feel like failures, even when all evidence suggests otherwise. In addition, people frequently procrastinate because of fear of failure.

If you are concerned that you do not have the knowledge, skills, or abilities to succeed, then why even try? Also, procrastinating because of a lack of confidence can often become a self-fulfilling prophecy. Did you not accomplish your objectives because you didn't have the ability or because you didn't give yourself enough time to prepare?

The contrast of fearing failure is fearing success. People may be confident in fulfilling their current role, but what happens when they are given more responsibility? It seems safer for individuals to set goals they can assuredly accomplish, but that mindset does not facilitate professional growth.

A fear of failure or even a fear of success can lead to a lack of risk-taking. Asking for a raise, applying for that promotion, requesting work assignments, and proposing innovative solutions all require some level of risk. Even contributing during meetings can be unnerving if you are worried that colleagues may learn of your incompetence. Impostor syndrome and the self-doubt associated with it can hold individuals back from striving to be seen, challenged, and recognized.

## Do you have impostor syndrome?

People with impostor syndrome often look for ways to improve themselves, recognizing there is always room for development. Although that may seem healthy, the reasoning behind it may not be. There is a difference between identifying competency

**Rather than pretending to be something you do not feel you are, reframe the situation.**

gaps for where you want to go professionally and imagining gaps for where you should be before people discover you for a fraud. The former focuses on growth whereas the latter is based in shame.

Individuals who have impostor syndrome often feel that they have been lucky. Maybe the standards were lower or their supervisor was focused on another priority or no one else was qualified for the position. Such people believe they did not deserve the recognition because they did not do anything to justify it. They feel their success was merely a fluke.

At the other extreme, people with impostor syndrome may believe they were able to reach their goal only because they put in more time and energy than anyone who was more capable or skilled would have needed to invest. They are the same people who become workaholics because they fear if they decrease their efforts, they will be discovered as inferior.

You can also identify impostor syndrome by noticing your self-talk. Are you habitually criticizing yourself? Do you tend to think negatively rather than focusing on the positives? Are you more likely to see obstacles or opportunities? Also, an external locus of control often contributes to impostor syndrome. Do you believe you control your own destiny and that the actions you take affect your outcomes? Or do you believe outcomes are already predetermined or others' decisions have significant impact on your experiences?

Assessments, including the Clance Impostor Phenomenon scale, identify the syndrome's tendencies. If you have difficulty identifying it in yourself, you may want to seek out an experienced professional skilled in identifying the signs.

## How do you overcome it?

Several methods can help combat impostor syndrome, both strategically by organizations and personally through self-improvement. Organizations can implement measures to assist their employees with overcoming it. For example, effective mentors can talk about their personal experiences with impostor syndrome, help to build their protégés' confidence, and encourage them to take on new challenges.

Employers can also create a culture that supports work-life balance. Do managers encourage or penalize their employees for using vacation or sick time? Does the company offer fringe benefits such as childcare services and gym memberships? Above all, employees learn organizational culture and appropriate conduct from their leaders modeling behaviors regardless of what the policies state.

Another technique employers can use is to reward risk-taking by recognizing failure as part of the innovative process. When employees are fearful of being punished for mistakes, they are less likely to attempt new challenges.

One way to encourage innovation and assist employees in overcoming impostor syndrome is building risk-taking into goal setting. If companies establish goals that reward a combination of both effort and results, employees will be more likely to take risks, knowing they will not be penalized for their efforts regardless of the outcome. Some organizations even give awards for failures. Rewarding employees who take risks, even when they do not succeed, means they will be more likely to strive for growth and develop resiliency.

Individuals can take action by using techniques to adjust their perspective. One example is cognitive behavioral therapy, whose goal is to address cognitive distortions and change thought patterns, beliefs, attitudes, and behaviors. Rather than pretending to be something you do not feel you are, reframe the situation.

The first step is to identify negative self-talk. Are you filtering out the positive and only letting in the negative? Do you accept criticism fully but disregard compliments? Are you minimizing the importance of a success? If you did well on a large company-wide project initiative, do you disregard it as luck, or do you accept that you did great work that will have a long-term positive impact?

You can also create a list of what is within your control, within your influence, and outside of your control. The list can help you reconsider what actions you can take so you feel less powerless. Finally, if your friends or colleagues were having these thoughts, what would you tell them? How is that different from what you are telling yourself? Sometimes self-compassion is the best solution.

## Dismiss the negativity

I am grateful that I went through with my conference presentation even though I was experiencing impostor syndrome. That action led me to my current career path, and I may not be on the professional journey I am now if I had let it hold me back.

Although the shame brought on by self-doubt, fear of exposure, and a sense of powerlessness associated with impostor syndrome can adversely affect professional growth and career advancement, you can take steps to decrease negative self-talk and increase your self-confidence. Over time, you will begin to see yourself not as an impostor but as the valued colleague and leader that you are.

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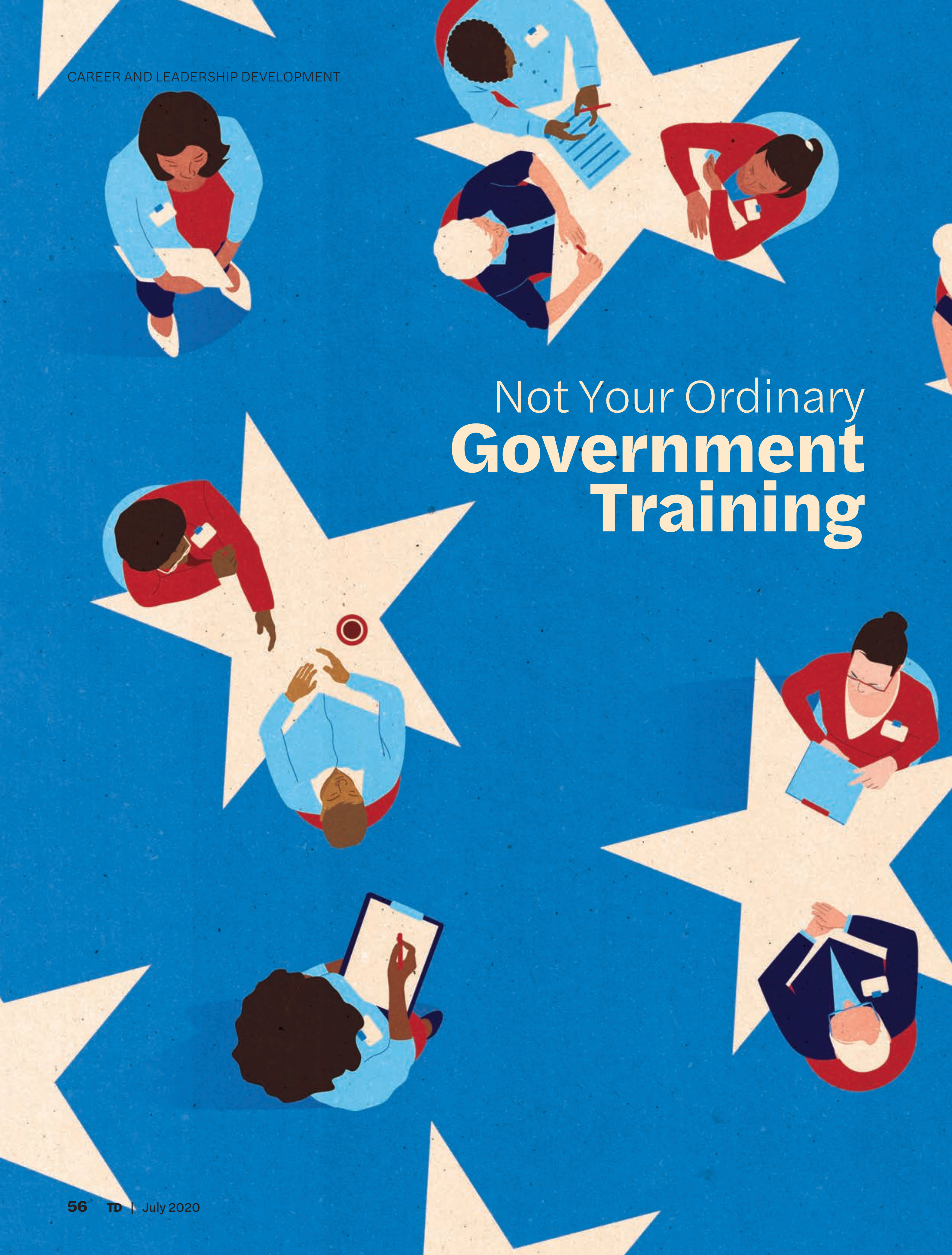
## Signs That Impostor Syndrome Is Affecting Your Career

If you agree with any of these statements, you could be experiencing impostor syndrome.

- I avoid speaking up in meetings because I don't want to sound ignorant.
- I have turned down opportunities because I didn't think I could do it.
- I feel undeserving when people give me compliments.
- I must put in more effort than my colleagues because they are more skilled than I am.
- I don't ask for raises because I don't think I deserve them.
- I have a lot of ideas for improving processes, but I don't say anything to my leaders.
- I feel like things are always happening to me rather than because of me.
- There are some projects I'm interested in doing, but I don't ask for them.
- I'm worried my colleagues are going to realize I'm not as smart as I pretend to be.
- Whenever someone presents me with an opportunity, I usually see all the reasons it won't work.



# Not Your Ordinary **Government Training**

The Experienced Supervisor Applied Workshop did away with slide decks full of policy to instead engage and motivate federal managers.

BY B.J. WHETSTINE AND MARY LU SCHWEITZER

ILLUSTRATION | KOTRYNA ZUKAUSKAITE

**B**eing a supervisor is one of the toughest jobs in the federal government. Performance management is challenging at the best of times. Add to that an increasing pace of change, shifting HR policies, and the looming retirement wave, and supervisors' work seems nearly impossible.

Considering all those challenges, the US Department of Agriculture's Animal Plant and Health Inspection Service (APHIS) has created an innovative training program to keep supervisors up to date and motivated. The Experienced Supervisor Applied Workshop directs managers to focus on the spirit and practice of effective management as well as current policy changes. If the thought of government supervisory training evokes pictures of a parade of droning subject matter experts and endless slide presentations, this workshop is not that.

## Background

APHIS launched the Experienced Supervisor Applied Workshop as a pilot program in 2018 after a year of assessing needs and planning. The program's purpose was to provide intensive, in-person training that would fulfill the organization's policy of mandatory supervisory training in the areas of mentoring employees, improving employee performance and productivity, conducting performance appraisals, and dealing with unacceptable performance.

Prior to this workshop, supervisors fulfilled their training requirement with online training or infrequent in-person offerings that only addressed one or two of the required topics. Senior leadership tasked the APHIS Center for Training and Organization Development with designing a new solution.

A planning team comprising seasoned trainers, instructional systems designers, and organization development specialists, including staff from the APHIS Professional Development Center who had designed earlier workshops, got to work. The planning team sought to develop something new and creative and provide supervisors with a forum to share best practices and tools that they could take back to their teams and use immediately.

To ensure that this new approach met the organization's needs, the planning team conducted interviews with supervisors with at least two years of management experience in the agency to determine what kind of training would be most helpful to them. The team also met with SMEs throughout the HR department to determine where they saw the biggest need for improvement. The organization already had a highly regarded training program for new supervisors, so the planning team analyzed participant feedback from that program and collaborated with the facilitators and project managers to design the Experienced Supervisor Applied Workshop.

## Test runs

Informed with all that material, the planning team developed a solution and launched two pilots in 2018 to determine whether the workshop achieved the established goals. While conducting the pilot workshops, the team gathered real-time feedback from participants on the activities and methods. The facilitators captured participants' feedback and suggestions throughout the sessions and reviewed the responses with participants at the end of each day.

The planning team incorporated the participant feedback as quickly as possible, sometimes even resulting in minor adjustments to the workshop for the following day. Those suggestions, as well as extensive feedback gathered from participants, facilitators, and SMEs post-training, resulted in the team changing some of the training content after the pilot.

The pilots included a session on building trust between supervisors and employees as well as a period of open discussion toward the end of the workshop. The feedback the team received on the trust session was that it was too basic and didn't live up to the applied nature of some of the other topics. And while the planning team designed the open discussion time for supervisors to bring their specific issues to the group for brainstorming and problem solving, participants said they instead wanted more focused time with the SMEs and that the session lacked structure, which prevented it from being useful. Participants also stated that they wanted a more practical focus on employee engagement.

Given the constructive criticism, the planning team removed the trust content and replaced it with a session that enabled participants to analyze data from the agency's employee engagement survey and work in groups to address the identified issues. In addition, the team discontinued the open session and allotted more time for focused discussions with an employee relations SME about employee performance and conduct issues.

Both replacement sessions received a great deal of positive feedback and remained in future offerings. This ongoing real-time feedback approach was so effective that the team incorporated it fully into the program design.

### Ready for launch

The result of the planning team's work and feedback from the piloted sessions is a 4.5-day workshop for up to 24 experienced supervisors. For the course's purposes, an experienced supervisor is defined as someone who has been a supervisor at the US Department of Agriculture for at least two years and has completed a developmental 360-degree assessment in the past three years. The three-year timeframe is consistent with the agency requirement that all supervisors participate in 360-degree assessments every three years.

Two facilitators lead the sessions. Because of the workshop's interactive nature, the selected facilitators have prior experience with role-playing and leading simulations. And to limit the number of individuals needed to conduct the workshop, the planning team sought SMEs who had expertise in multiple HR areas.

The facilitators deliver most of the interactive content and serve as the role players in the coaching simulation sessions. The facilitators also connect with the SMEs in advance of the workshop to engage in rehearsal sessions. This preparation helps make the simulations as real as possible for the supervisors so they can practice new approaches to tough conversations.

So, what is it that makes the Experienced Supervisor Applied Workshop different from other federal supervisory training?

### Deep self-reflection

All participants complete a developmental 360-degree assessment that includes a one-on-one facilitated debrief in advance of the session. They spend time taking an honest look at their strengths and areas of improvement and complete a values identification exercise to develop personal leadership philosophies.

Over the course of the week, while learning and applying concepts of coaching, employee engagement, performance management, mentoring, meeting planning, and talent management, participants continue to reference and discuss their 360 results, values, and draft leadership philosophy. All the activities serve to build learners' self-awareness, expose their blind spots, and help them communicate to their teams what is most important to them. Participants walk away from the experience with detailed action plans and well-defined leadership philosophies as well as a better sense of who they are as supervisors and as human beings.

### Graphic recording

A graphic recorder captures the first two days of content. Using markers and pastels, the graphic recorder makes the great ideas and breakthroughs come to life on the walls around the participants. Learners are amazed watching the graphic recorder work, many finding it hard to believe that she can capture everything that everyone is saying and turn it into art.

The graphic recordings have included caricatures of the facilitators, colorful

**Participants walk away from the experience with detailed action plans and well-defined leadership philosophies.**

images of 360-degree assessment data graphs, employee engagement data, and adjectives describing the types of leaders that participants aspire to be.

The planning team works with the graphic recorder in advance of the workshop, sharing content and discussing how to display it to the best effect. The graphic recorder then creates a visual outline and fills it in with the participant-generated information as she puts the images on the giant paper that covers the walls.

Of course, there is plenty of room for creativity in the moment, and no two graphic-recording sessions end up alike. At the end of each workshop, the graphic recorder produces laminated copies of the artwork and shares them with the participants. They then hang the copies in their offices as a constant reminder of the lessons learned during their training.

## Practical application

In the workshop, participants don't just explore new approaches and policies; they apply them. The program's centerpiece is a series of simulated coaching conversations that participants have with highly skilled role players acting as employees.

**The biggest increases were in the skills of running effective meetings and holding performance discussions with employees.**

Role players receive a detailed improvisational script that participants do not get to see. The script doesn't contain specific lines for the role players, but it does provide them with their motivation, justification for their behavior, and how they should react if the supervisors respond in certain ways.

The participants review concepts around employee coaching and mentoring as well as best practices in performance management, then they put them to the test. In one scenario, participants must hold an end-of-year performance conversation with an employee who expects a higher rating. In another, they must address an employee who is reported to be harassing another employee. Participants must apply the skills that they have learned, or there are real-time consequences.

The role players make their reactions as realistic as possible and push the supervisors to try a different approach than they may be used to. For example, if a supervisor is combative when addressing the employee accused of harassment, the role player becomes defensive or raises his voice. Or if a supervisor is insensitive while delivering the disappointing performance appraisal, the role player may shed tears. Participants consistently report that these role-play sessions are the highlight of the workshop and some of the most effective training exercises they have ever completed.

The situations exhibited during the role plays represent some of the toughest conversations that supervisors will face and take participants from learning about coaching employees to actually coaching. Facing such situations in a safe environment prepares learners for handling them with real employees when the stakes are high.

## Feedback

The final aspect that separates this workshop from other supervisory training is the focus on feedback. Participants are paired with peers for all the activities, discussing their ideas, plans, and insights and providing ongoing feedback throughout the week. They receive peer feedback on each topic and activity and apply that ongoing feedback to their action plans and leadership philosophies.

In addition to deliberate peer feedback, the workshop does include a parade of SMEs—but they aren't there to lecture. Rather, they observe the participants demonstrating their supervisory behaviors and provide feedback. They also observe the coaching conversations and note the positive aspects of the supervisors' performance as well as where there is room for improvement in both application of policy and how they communicate with employees.

That feedback leads to robust discussions about the underlying purpose and practical application of performance management and the equal employment opportunity policy. Instead of simply reading policy off slides, the SMEs discuss how the policy applies to issues participants are facing with their employees. Feedback from multiple sources (360s, peers, and SMEs) creates an environment where supervisors can validate their positive supervisory behaviors and challenge the behaviors that aren't working. It also makes participants more comfortable with giving and receiving meaningful, effective feedback, which is one of the most significant supervisory behaviors.

## Impact

APHIS administers several assessments to measure the workshop's impact. Participants take a pretraining assessment approximately one month before the session, where they rate themselves on eight key supervisory skills and the frequency with which they use the target tools and approaches. The assessment also asks the supervisors to share specific challenges they are facing and questions for the facilitators and SMEs so that the workshop leaders are prepared to address participants' stated concerns.

Participants also take an assessment immediately after the workshop that focuses on their reactions to the content as well as the usefulness of the tools and approaches. One final assessment, directly linked to the preworkshop assessment, is administered eight weeks after workshop completion.

Participants in 2019 reported an average 9 percent increase between the pre-assessment and the eight-week assessment in the eight core supervisory skills. The biggest increases were in the skills of running effective meetings and holding performance discussions with employees. The average Net Promoter Score for the year was 92, meaning that almost every participant would enthusiastically recommend the workshop to their peers.

Some of the highest praise came from the sessions that coincided with the annual performance review season. In the eight-week assessment, 100 percent of participants indicated that they took a different approach to the end-of-year performance appraisal conversations based on what they learned during the workshop. Furthermore, they all reported that those conversations were effective and meaningful.

## Adjustments ahead

The onset of COVID-19 caused APHIS to postpone some of the Experienced Supervisor Applied Workshop sessions. The pandemic has also forced the planning team to consider how it could deliver a virtual program that would have as significant an impact as the in-person version.

During the next few months, the team will be designing a virtual workshop that focuses on the core areas of employee engagement, mentoring, and performance management, as well as action plan development and leadership philosophy. It is unreasonable to expect people to sit in a 4.5-day online course, so the team plans to break up the content into six two-hour sessions over the course of a few weeks.

Participants will complete much of the reflection and individual activities between sessions. The team will update the role-playing sessions to acknowledge the virtual working environment that most staff are dealing with now. And the coaching simulations will take place via videoconferencing, as real supervisory coaching sessions often are. The modifications will serve APHIS well in the future, enabling the organization to reach supervisors who can't travel, save money on travel and logistics, and meet remote supervisors' needs.

If you are struggling with how to make supervisory training something more than a box-checking, bureaucratic exercise, try an approach like ours. It can be expensive and labor intensive bringing supervisors, facilitators, and SMEs together for this amount of time. However, if you provide supervisors with deep self-reflection, peer feedback, and practical coaching experience, it will be well worth the investment. You will find that your team can create an experience that will engage supervisors and bring about meaningful change in the organization.

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# Build Better Relationships at Work

## Short, high-quality interactions can have lasting benefits.

BY KELLIE CUMMINGS

In many ways, your professional growth will depend on your ability to foster trusting and supportive relationships throughout your career. Work gets done through connections with others. And when people like working with you, they're more likely to ask you to join them on influential projects that give you an opportunity to expand your skills and grow professionally.

When people think of relationships, they often think of long-term connections with others. But individuals can foster positive and mutually enjoyable connections much more quickly. Jane Dutton, professor emerita of business administration and psychology at the University of Michigan, explains that meaningful connections with others can occur during a brief exchange that is infused with openness and vitality. In fact, people can establish them in just a few minutes.

So, how do you go about filling your everyday work environment with positive connections? First, it's helpful to deepen your understanding of what these relationship-building tools really are. High-quality connections, those brief exchanges between two people that make each person feel valued, are energizing and raise each person's sense of mattering, which is necessary for human flourishing. According to Dutton, "high-quality connections are interactions with other people that actually light us up."

Consider these ways that positive connections can strengthen your leadership capabilities:

**Trust.** When you take time to connect genuinely with another person, you begin the important work of fostering trust. The more trusted you are, the more likely others are to turn to you with sensitive matters that require discretion and integrity.

**Collaboration.** Contributing to other people's ideas creates pathways for you to share in the achievements of teams and projects that extend beyond your own work. Collaboration is the lifeblood of any healthy organization; your opportunities to collaborate increase as the quality of your connections grow.

**Influence.** There once was a time when people at the top of an org chart held most of the influence. Today, a person's ability to influence is defined by the strength of that individual's connections.

Positive connections also will strengthen your well-being. Research shows that people who have more positive connections in their lives are more resilient in the face of stress. Emma Seppälä, a Stanford University psychologist,

### 4 Ways to Create a High-Quality Connection

1. Start with positive intentions. People feed off your energy, so project a positive view of others and of the future.

2. Be open and vulnerable. Leaders who are open to feedback and are willing to admit mistakes foster trust.

**Focusing solely on tasks can prevent you from noticing the human dimensions of others.**

explains that positive social connections strengthen a person's immune system, mitigate depression, and even lengthen their lifespan. That is especially important today, because almost 50 percent of Americans feel lonely, according to global health services company Cigna. And loneliness increases a person's risk of anxiety, depression, and physical illness.

To cultivate high-vitality and mutually beneficial connections in your work relationships, follow these guidelines.

### Prioritize people in the workplace

Often, an individual's work is assessed according to the tasks they complete. Many people, therefore, arrive at work focused on the most pressing deadlines and projects they want to make progress on that day. However, focusing solely on tasks can prevent you from noticing the human dimensions of others standing right next to you.

The first step toward building mutually supportive relationships with co-workers is to believe that your time spent getting to know someone else is time well spent. When you prioritize people in addition to tasks, you are more inclined to ask someone about their life outside of work or to share your own struggles, which fosters trust.

People are social creatures and are wired for relationships. We all want to feel that we matter and that our peers respect us. Next time you arrive to a meeting early and one of your co-workers is there, don't check your email or see what you have coming up next on your calendar. Instead, leave your phone alone and take a minute to ask your co-worker a question that shows a genuine interest in their life. According to research, a short conversation rooted in mutual care and interest can boost your happiness and your co-worker's happiness.

### Listen to understand

When you only listen long enough to make your own point or to ask someone for help on a project, you're not really listening to understand. And without showing a true interest in someone else, it's difficult to create an honest connection. Stephen Covey, the late management expert, said that individuals should "Seek first to understand. Then to be understood." When you listen to understand someone, you allow yourself to be genuinely curious about the other person.

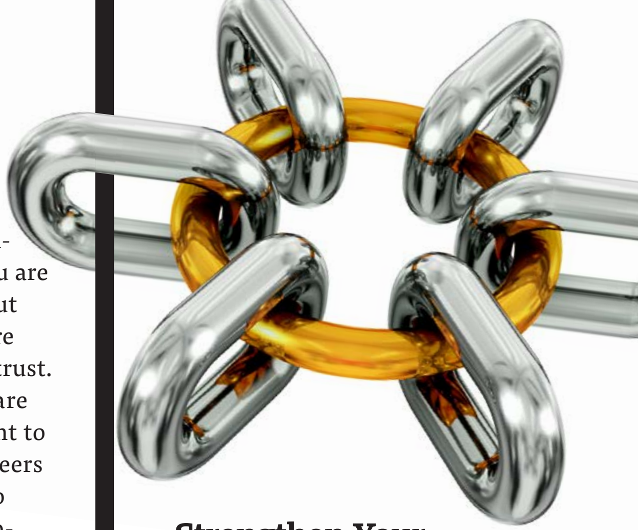
To spark a high-quality connection, Dutton recommends starting with intentional questions that convey genuine interest in learning more about the other person. Such questions invite the other person to share something that matters to them, offer that individual help and assistance, or demonstrate an interest

3

Look beyond tasks. Pay attention to the whole person in front of you, not just their work performance.

4

Listen to learn something new. When you listen with curiosity, you hear what the other person is and isn't saying.



## Strengthen Your Connections While Working Remotely

In the workplace, opportunities for building quality connections arise serendipitously; but in a remote environment, workers must be intentional about fostering connection. Here are a few ideas to inject more quality into your long-distance connections.

- Dedicate time at the start of a meeting for conversation that is not related to work. Ask about people's lives outside of work and listen in a way that shows you are genuinely interested.
- Schedule video calls for purposes other than work. Friday afternoon happy hours and virtual lunches create a space for sharing and connecting.
- Invite co-workers to show you how they've organized their workspace.

Most importantly, remember that getting work done with others is not the same as building relationships. To foster meaningful connections, you must go beyond transactional interactions to understand the human dimensions of the people you work with. Virtual environments provide fertile ground for genuine connection when you remember to make people a priority.

IMAGE | ADOBE STOCK

in the person's life outside of work. By moving away from transactional messages and intentionally learning about the deeper dimensions of someone's life, you can ignite a connection that has lasting benefits for both of you.

William Ury, a negotiation expert and TEDx speaker on the topic "A Listening Revolution," says that "Listening may be the golden key that opens the door to human relationship." However, he also points out how infrequently people truly listen to understand someone else. He advises individuals to listen to each other with openness and curiosity.

"In genuine listening, we listen not just for what's being said, but for what's not being said," Ury explains.

Therefore, the second vital step to building rich relationships at work is asking questions and then listening for something unexpected in the person's response. Use active listening techniques that demonstrate your genuine interest. Echo back what you think you heard the other person say and ask for affirmation or correction. Nod and make eye contact to show that your focus is on the person and what they are saying. Pause after they finish talking rather than immediately launching into your own idea, opinion, or advice.

### Get curious about difficult relationships

One of the hardest parts of anyone's work environment is a negative, or corrosive, relationship. Everyday encounters that are low in trust and mutual respect have the opposite effect of high-quality connections. Corrosive connections can drain your energy, undermine your happiness when you're not at work, and erode your ability to enjoy aspects of your job that don't involve that person.

Once again, Dutton's research sheds light on how to minimize the effects of those unfortunate connections. First, she says that they are legitimate sources of negative sentiment that sap your well-being and should be taken seriously. Those experiences "are damaging to your body and your psychological well-being," she continues.

If the unproductive relationship is with a manager, there's not much you can do to change the situation, but you should reduce the physical time you spend in that person's presence and reduce the amount of time you spend thinking about that person.

Second, the science of positive psychology shows that both exercise and meditation reduce the effects of stress. If you're struggling with a difficult relationship, incorporate brisk walks or running outdoors, or make time for meditation.

Last, Dutton shares that most people want to improve the negative relationships in their work environment. Because relationships are reciprocal, it's best to assume the other person wants to improve the situation as much as you do.

"Most people will want to work toward making it better, because it's rarely just hurting one person," she explains. "One of the most helpful things is to be curious and inquire what's going on." That way you can talk constructively about changing your relationship so that it becomes more energizing and productive for both of you.

### Promote organizational well-being

Because people accomplish work through relationships, your workplace provides the ideal setting for you to connect in ways that promote human flourishing. You'll become more collaborative, connected, and energized. The same behaviors that center on prioritizing other people also strengthen your growth as a leader. High-quality connections will support your efforts to foster trust, collaboration, and influence, which are essential elements of a successful career.

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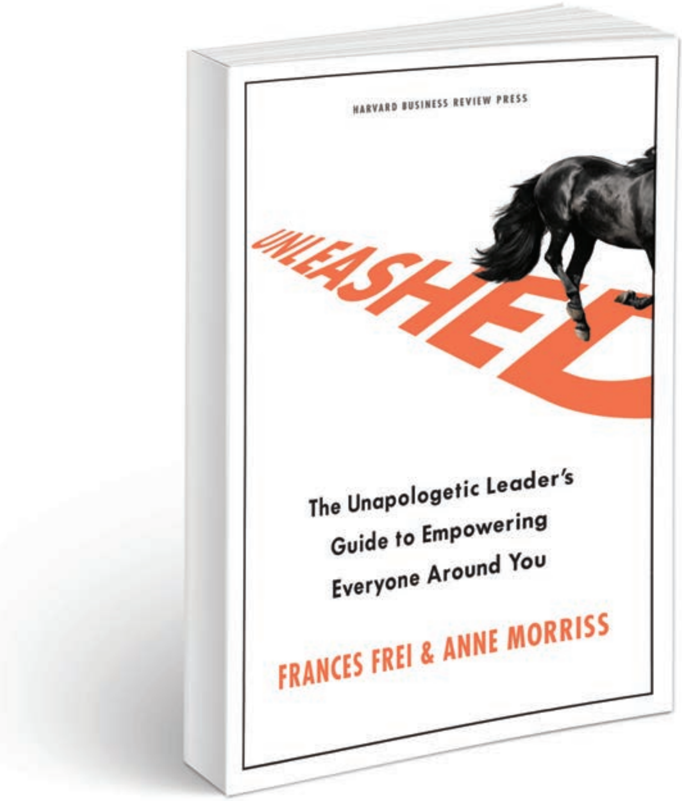


# The Ripple Effect

## Unleashed: The Unapologetic Leader's Guide to Empowering Everyone Around You

By Frances Frei and Anne Morriss
Harvard Business Review Press, 240 pp., $30

REVIEWED BY TATIANAIDE MEDINA NIETO

In *Unleashed,* Frei and Morriss center successful leadership on one concept: empowering others. Both advocates for diversity and inclusion and leadership change management, they use career anecdotes to bring to life the idea that leadership is about making a long-lasting, positive impact on your team, even when you're not there.

To produce this type of impact, the authors present the Rings of Empowerment Leadership: trust, love, belonging, strategy, and culture. Each builds on the other. The first three rings comprise the foundation that leaders create while being present with their teams, and the last two are formed in the leaders' absence.

Through exercises, sidebars, and reflection questions, the book provides insightful information on how to address the rings. With these consistent elements, readers can apply the concepts and create actionable steps toward building each ring.

The exercises helped me to better understand how each ring influences empowerment leadership. The Trust Triangle, for example, outlines the three attributes of trust: authenticity, logic, and empathy. All three build the foundation for your team to trust you. Trust Diagnosis exercises guide you in discovering your trust wobble and trust anchor. Identifying both is the first step toward strengthening the trust ring. The authors then provide examples of each attribute to help you create actionable steps toward building the trust ring.

Like the Trust Diagnosis exercises, the chapters trigger an introspective reflection: How do you show up as a leader? Are you making a difference in team members' development? Is your leadership influence present even when you're not?

Although previous leadership literature discusses the concepts examined in this book, Frei and Morriss take on a fresh, casual, and more personal approach. I encourage you to read the book with an open mind. As a leader, you are the rock that when falling into still water creates a ripple effect of waves that continues on even after the rock is no longer there. Use this resource to help you create the ripple effect that you want within your team and organization.

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# Create Accessible and Compliant Training Videos

## Captions and audio descriptions are must-have features to ensure all viewers benefit.

BY ELISA EDELBERG

As more and more of our lives move online, providing accessible video content will be critical to any corporate training ecosystem's success. Despite the more than 2,000 web-accessibility lawsuits filed last year in the US, accessibility is not simply about legal requirements—it's about access and inclusion.

### What it is

People often tend to think about accessibility only in terms of physical access, but web and video accessibility are just as important. Accessible videos enable all people, regardless of ability or disability, to understand and interact with the content equally. Making videos accessible entails adding captions and audio descriptions and ensuring you publish or stream the videos via an accessible video player or platform that enables viewers to use a screen reader and keyboard navigation.

Including captions in videos serves various functions. Initially developed as a tool for individuals with hearing impairments, captions are time-synchronized text of both the spoken word and relevant sound effects in a video. Because captions are meant to be in sync with the audio, it's important to accurately set the timing when creating the caption file so that it displays at the appropriate time.

Although audio descriptions were originally intended for people who are blind or have low vision, they have proved to be beneficial for a much broader audience. The concise and objective translation of visual content promotes a new way of learning through auditory means and can help individuals develop their language, improve learning outcomes, and strengthen writing skills.

### How it works

Numerous US accessibility laws as well as state and local laws require captions and audio descriptions on video content, including training videos. However, outside of compliance, accessibility is critical to training videos for several reasons.

A Center for Talent Innovation study found that 30 percent of working professionals in the US have a disability. The study also reveals that 62 percent of employees with disabilities have invisible disabilities—those that someone cannot immediately identify upon meeting a person. Examples include vision or hearing loss.

In addition, many audiences, not only employees with disabilities, benefit from captions. Other audiences to consider include learners with a preference for reading over listening, people whose native language differs from what's spoken in the video, or individuals watching a video with difficult-to-understand speakers or multiple speakers.

Regarding the benefits of audio descriptions, communication experts know that listening is a key step in learning language, and an estimated 20–30 percent of people retain information best through sound.

**CHECKLIST**

**Requirements for Training Videos**

- Add captions for all live and recorded training programs.

### Guidelines

To incorporate captions into your next training video, you can either create your own, use automated speech recognition (ASR) technology, or outsource the task to a vendor. To create your own captions:

- Transcribe the video, including all nonspeech elements and speaker identification.
- Set timings manually or by using software.
- Convert the caption file to a format the video player accepts.

If using ASR technology:

- Upload the video to YouTube to get ASR captions.
- Comb through the transcript to make edits and check for accuracy.
- Upload the captions to YouTube or export the caption file to use with other video players.

If you decide to hire a vendor to develop video captions, some companies use ASR technology to produce a draft transcript. Select a vendor that has professional transcript editors who will review and make edits where necessary. Also ensure that the vendor puts the transcript through a rigorous quality assurance process where a quality assurance professional conducts a thorough review and makes any final edits to achieve 99 percent accuracy.

To produce audio descriptions, you can narrate the visuals at the time of the recording, record a voiced description and merge it with the source audio, or outsource the task to professionals.

If you don't plan to use a vendor, be aware that recording descriptions and creating captions on your own can be time consuming and labor intensive. Also keep in mind that the video player or platform that will host the video must be able to accommodate your newly created captions and audio description.

**RESOURCES**

3PlayMedia. n.d. "Zoom Live Auto Captioning How-to Guides." www.3playmedia.com/solutions/how-it-works/how-to-guides/zoom-live-auto-captions.

Dukes III, L.L., C. Frechette, and K. Morris. 2019. *How Closed Captioning and Interactive Transcripts Impact Student Learning.* St. Petersburg, FL: University of South Florida St. Petersburg.

Sherbin, L., and J.T. Kennedy (with P. Jain-Link and K. Ihezie). 2017. *Disabilities and Inclusion: US Findings.* New York: Center for Talent Innovation.

Usablenet. 2019. "Usablenet Releases Its 2019 ADA Web Accessibility and App Lawsuit Report." Usablenet Blog, December 18. https://blog.usablenet.com/usablenet-releases-its-2019-ada-web-accessibility-and-app-lawsuit-report.

### Results

Contrary to popular belief, 80 percent of people who use captions aren't deaf or hard of hearing. In fact, many are learners. Captions help with dialogue comprehension, clarification of terms, concentration, and engagement. According to Oregon State University's *Student Uses and Perceptions of Closed Captions & Transcripts*, 99 percent of students find captions helpful.

The report also found that 71 percent of students without hearing difficulties said they use captions at least some of the time. The respondents indicated that they use captions to help with focus, for information retention, for a clearer understanding of professors, and to be able to watch videos in sound-sensitive environments.

If students in a traditional learning setting find such accessibility tools useful, then corporate learners likely will too.

In another study, *How Closed Captions & Transcripts Impact Student Learning*, researchers from the University of South Florida at St. Petersburg found that 42 percent of respondents said captioning helped with focus, and 37 percent reported increased retention. Moreover, among participants in the closed-captioning group, 45 percent said the tool was moderately or extremely helpful, and more than half said it was at least slightly helpful.

Those data points, along with the known benefits of captioning and audio descriptions, demonstrate that adding accessibility features to corporate training videos will not only increase reach but also make the videos more memorable to learners and have a greater impact as well.

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Note: This article is for educational and general information purposes only and does not constitute specific legal advice.

- Clearly explain all visuals in the source video content or add audio descriptions in postproduction.
- Select a video player or hosting platform that is fully accessible.

# 4 Plans for Employees' Return to the Workplace

Following any major business disruption, employers must be deliberate about reboarding—reconnecting employees under new business practices—to obtain optimum performance. As businesses reopen and staff come back to the workplace, use these strategies to ramp up productivity.


1 **Schedule a fast-track reboarding session.** Discuss new business practices such as designated offices and rooms as safe zones, explain new hygiene etiquette, and consider launching a buddy system for employees to mentor each other through the changes.

2 **Schedule a human relations session.** Debrief with employees about how they coped with the pandemic and how they plan to move forward. Relationships are important to employee success, so invest time in staff reconnecting with each other.

3 **Communicate company goals going forward.** Share organizational goals and promote any training opportunities to keep employees engaged. Give staff a vision for the future to drive commitment.

4 **Recognize and reward high performers.** Celebrating high performers and employees who continued to thrive despite the disruption will help to rebuild a climate of confidence in the workforce.

SOURCE: CARRIE VAN DAELE, PRESIDENT AND CEO, VAN DAELE & ASSOCIATES; BRIAN DUMFORD, TRAINING ASSOCIATE, VAN DAELE & ASSOCIATES

IMAGE | ADOBE STOCK