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TRANSFORMING THE TRAINING ORGANIZATION

**THE 2010 UPDATE TO RUNNING
TRAINING LIKE A BUSINESS**

**AN EBOOK BASED ON IN DEPTH RESEARCH FROM
HUNDREDS OF ORGANIZATIONS FROM AROUND THE WORLD.**

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Executive Summary



Executive Summary

A decade ago, Ed Trolley wrote our industry's seminal book, "Running Training Like A Business". At that time, Trolley's theory was that the training industry was focused more on running as a function than a business. The principal ramification of this phenomenon was that neither the company nor the training professional felt fully satisfied. The company did not feel it was getting value and the training professionals did not feel that their contribution was valuable. Trolley's fundamental premise was that training departments had to transform themselves from a function orientation to a business orientation. Further, in order to be "like a business", the training function had to be both effective and efficient. In Trolley's view, effectiveness and efficiency means that training departments should:

- be customer driven – uncover and prioritize critical needs;
- be lean and agile, doing internally that which is a core competence and valuable - the other activities that are not a core or add little value should be outsourced;
- have a solid and repeatable professional service delivery model that ensures consistency and quality in the delivery of services;
- transparently report the results they have achieved – aggressively reduce costs; and
- measure your success by your customers' success.

We conducted a survey to determine if:

- there have been any significant changes, developments, approaches, and/or conditions which have either added to or changed the core tenets of "running training like a business"; and
- training functions, now generally called learning organizations, have made the transformation espoused in Trolley's book.

We asked many questions, but ultimately determined that a function that runs like a business can, in fact, demonstrate that it provides a competitive advantage (value) to the business and can support that with quantifiable measures. In other words, the customer would be willing to pay for the service because it provides value. We found no evidence that the key tenets of running training like a business are different today than when the book was written, and found very strong evidence that the "promise" of value creation in these tenets is very real if, in fact, they are followed.

But, as the saying goes, "The more things change, the more they stay the same". Of the nearly 150 companies that we surveyed, there were only 18 that could make that claim that they provide value and can demonstrate it with quantifiable metrics. Therefore, we looked at the practices that these 18 undertake to determine if their practices vary from the practices of the population as a whole. The answer was a resounding yes. Of the nearly 50 practices that we analyzed, we found that a clear majority of the 18 top performers that could demonstrate value were at least twice as likely to have effective processes.

We then grouped these individual practices into the six broad principles of effectiveness and efficiency described at the beginning of this summary. Here is what we found.

Aspect of RTLAB	Average of all Respondents	Average of 18 Top Performers	Variance (multiple that top performers are more likely to have practices)
Customer driven	21%	60%	2.92 x
Lean and agile	32%	56%	1.75x
Repeatable service delivery model	22%	61%	2.82 x
Transparent reporting	36%	69%	1.88 x
Reduce cost	34%	69%	2.04 x
Measure your success by your customers' success	29%	74%	2.56 x

Set forth below are some very specific practices that had dramatic variances between all respondents and top performers.

Activity	Average of all Respondents	Average of 18 Top Performers	Variance (multiple that top performers are more likely to have practices)
A way to measure programs against customer expectation	13%	56%	4.3x
Integrated measurement system	12%	50%	4.1x
Single IT infrastructure for learning	14%	56%	3.9x
Effective strategic governing board	10%	39%	3.8x
Driven and measured by business goals	18%	67%	3.7x
Interaction with an advisory board	16%	56%	3.6x
Process to debrief with customers to capture lessons learned	19%	67%	3.5x
Process to select and manage vendors	7%	22%	3.3x
A governing board that measures the performance of the learning organization	14%	44%	3.3x
Dynamic process to understand needs	27%	83%	3.1x
Link training to results AND get customer authorization	18%	56%	3.02

We had thought that given all of the research, writings and discussion around transformation of the training function to a strategic driver in a knowledge economy would have resulted in widespread adoption of practices. However, the data tell us that there are still many areas where learning organizations struggle to run training like a business.

OUR CONCLUSIONS FROM THE DATA CAN BE SUMMARIZED AS FOLLOWS:

It is clear that the practices espoused in RTLAB are directly linked to delivering value to the enterprise.

- Effective implementation of a strategic governing board to ensure alignment between learning and the business is exceptionally problematic, with only 10% of the respondents believing that they have an effective strategic governing board.
- Interaction with tactical advisory boards is only slightly more effective (17%), even though the members of this board really constitute a significant customer voice.
- Integrated measurement systems and measurement of business impact remain elusive in spite of innumerable articles, books, workshops and trade show sessions to the contrary.
- Although there has been a lot of consolidation, homogenization and commoditization of core learning technologies, a predominance of firms still do not have a single integrated IT infrastructure that would create leverage.
- Even simple things such as effective and consistent design and delivery standards across the enterprise exist only about one-third of the time.
- Across each critical process, and in total across all practices, only about one-third of companies approach the notion of running training like a business.

OUR INFERENCES FROM THE DATA ARE AS FOLLOWS:

- Training remains tactical.
- The “keys” to being strategic are obvious, but many cannot effectively “grab those keys” to unlock value.
- Most companies have fragmented, ad hoc learning processes across the enterprise.
- While good in theory, a full or mostly full variable cost model is really not the preferred approach even among top performers.
- The training investment is poorly managed.
- While migration toward “Running Training Like a Business” is occurring, the rate of adoption after a decade is less than that which is desired, that we would have expected, or that we would recommend.



Chapter 1. Overview



Chapter 1. Overview

WHY RE-EVALUATE THE PRINCIPLES?

A decade ago, Ed Trolley wrote our industry's seminal book, "Running Training Like A Business" (RTLAB). Over the past ten years, many things have changed in the training industry, not the least of which is that training now carries the mantle of learning and development. Among other changes that have occurred in business:

- The proliferation of the Internet has enabled the rapid creation and broad dissemination of content, information and disinformation through Personal Digital Assistants (PDAs) that have allowed content to reach anyone, anywhere, anytime.
- Globalization has provided an opportunity to improve operational efficiencies (lower costs) in every aspect of business.
- United States (U.S.) based manufacturing, already in decline in the late 1990s, has shed 30% of the jobs that existed in 1998.
- The oldest baby boomer reached 60 years of age, ushering in "The Retirement Boom" which will see more and more intellectual property walk out the door every year, much of which encompasses leadership.
- The employment focus and discussion in the U.S. has shifted from the "war for talent" to "risks of permanent unemployment".

Most people would agree that the foregoing list contains elements of fundamental change. However, it is worthwhile to abstract those statements to determine whether these conditions really constitute a fundamental change, or if these statements simply reflect routine change that manifests itself differently over time. The list above could be rephrased as follows, all of which could have been made at any time over the past centuries:

- There is more information readily available to everyone.
- Businesses look for low cost venues to produce goods and maintain operations.
- Capitalist economies are subject to creative destruction.
- Populations have demographic changes.
- There can be dramatic fluctuations in employment levels.

Clearly, there are structural changes that require innovation and adaptation. However, there are changes that are simply current manifestations of an underlying element that is always in a state of constant flux. The ability to distinguish between the two differentiates those who chase fads and those who build great organizations. Let us contrast two much ballyhooed, but different, changes: globalization and the Internet.

Globalization has caused a shift in the nature of how and where business is conducted. Communication and coordination of the entire commerce chain – from supplier to customer – now involves nearly every part of the globe for companies of all sizes. However, this is really only a change in the velocity, speed and complexity of the commerce chain. The underlying activities of securing raw materials, converting them into products, and delivering them to

customers have not changed. Basically, there has been no disintermediation of the process or the participants in the process.

The Internet, on the other hand, simultaneously eliminated several aspects of the information business, such as time, physical movement and barriers to production. Because of this, the Internet is effectively killing entire industries, such as the traditional print media and book retailers, forcing businesses in those industries to adapt and change.

The challenge before learning leaders is to understand which aspects of the shifting landscape over the past decade have created a need to change approaches to running training like a business, and which shifts are simply new manifestations of existing challenges. Clearly, some aspects of corporate learning, such as strategic linkage to the business, are still applicable while others, such as traditional classroom learning, are not.

OUR THESIS

Business is business is business. Regardless of changes, every business (and in this case we refer to training as an internal business that serves a single customer – the enterprise) must engage in core activities. These include identification of market need, development of products to address those needs, a customer facing organization to monitor needs of customers on a regular basis, an efficient production capacity that can provide products at a competitive price, a delivery mechanism, and the ability to measure value derived from the activity of the enterprise. There are companies that deliver learning for a living and you can be sure that their view of an effective learning business encompasses those activities.

“OUR THEORY IS THAT THOSE LEARNING LEADERS WHO APPROACH THE BUSINESS OF LEARNING WITHIN THE ENTERPRISE IN ACCORDANCE WITH THE FUNDAMENTAL ASPECTS OF BUSINESS ARE . . . HIGHLY VALUED BY THEIR ORGANIZATION”

Because of jargon advanced by industry pundits and consultants, learning leaders often and ostensibly discuss the learning function as something different than a business that has the activities described above. There are those who say you must build a “High Impact Learning Organization”. We don’t know what that means, but if it is shorthand for the foregoing paragraph, then we would agree, but would simply say that you should run learning like a business. We believe that if you stick to the core elements of business, supplemented with innovation available by reason of technological change, you will have a successful learning organization within your enterprise.

Our theory is that those learning leaders who approach the business of learning within the enterprise in accordance with the fundamental aspects of business are often part of the senior leadership team and are highly valued by their organization. Those who jump on fads or fail to stay true to the core principles are often relegated to an overhead function routinely subject to budget cuts.

THE SURVEY

We surveyed over 150 companies to determine which of the principles of RTLAB are still prevalent and relevant, and which of those have been impacted by changes over the past decade. The companies were nearly evenly divided between those with less than 2,500 employees, those with greater than 2,500 but less than 20,000 employees, and those with greater than 20,000 employees. Our industry breakdowns were as follows.

Industry	%of Respondents	Industry	%of Respondents
Consumer Services	3%	Other	35%
Finance & Manufacturing	16%	Professional Services	14%
Heavy Manufacturing	1%	Technology	10%
High Tech Manufacturing	2%	Utilities	3%
Manufacturing	11%	Other	3%
Mining & Exploration	1%		

Figure 1. Breakdown of respondents by industry

We structured our survey as a series of questions regarding the degree to which the RTLAB processes are applied throughout the enterprise and the degree to which they are effective. The questions were asked on a scale of one to six with one meaning that the processes do not exist and a six indicating that the learning processes exist across the enterprise. We asked similar questions regarding the effectiveness of those processes. For purposes of this report, we will, where applicable, aggregate the data for those answered one or two as poor, those that answered three or four as average, and those answered five or six as good.

We then interviewed companies that were successfully implementing those processes to determine the approaches that were being used and, if certain processes were not being implemented, what was the reason for not doing so. From those interviews, we were able to uncover best practices, which are highlighted in this report.

The data yielded some interesting results that we will detail in subsequent chapters. A few key points worth noting:

- Strategic linkage to the business is still challenging for many companies.
- Measuring the value of learning is still problematic. Only about one third of the companies have learning organizations that are driven by business goals and can demonstrate business value.
- A majority of time and money is spent on tactical activities.
- Among those learning organizations that deem themselves effective (deliver value), the predominant funding model is a corporate charge back without any allocation.

While there are numerous data points in this survey, we asked two simple questions for each: Does your organization drive maximum efficiency and does it drive maximum effectiveness? These were opinion questions that had a range of answers from one (strongly disagree) to six (strongly agree) – the results of which are set forth below in Figure 2. Throughout the remainder of this report, we will use this type of chart quite often. You will note that we have boxed the upper right data points. These two data points represent the condition in which it can generally be said that the combination of conditions exists. In other words, about 28% of the respondents would conclude that the organization is effective and efficient. What is interesting to note as you read the remainder of the report is that quite often, regardless

of the nature of the questions asked, there is roughly one-third to one-half of the respondents that meet this criteria. Of course, this is not always the case, but it is quite common.

Throughout this report, you will see charts that have the same format as Figure 2. In each instance, the bubble size equates to the number of people who answered the question set (i.e. two separate questions) in a given manner. So, in other words, 20% of the respondents said that their learning organization was both very efficient and very effective, while 28% said it was very efficient but only somewhat effective.



Figure 2. About 28% of all respondents would conclude that learning organization drives maximum efficiency and effectiveness. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

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Chapter 2. Business Linkage

UNDERSTANDING THE MARKET



Chapter 2. Business Linkage: Understanding the Market

Strategic linkage to the business means offering the programs and services that contribute to the competitive advantage of the company that can be quantified. In this regard, learning organizations have strategic linkage to the business if they:

- act as a catalyst for key strategic corporate initiatives as established and defined by senior executives (advance long term strategic goals)
- address critical function or line of business needs over the short and long run (offer services and programs that serve to enhance the value of day-to-day operations); and
- can be dynamically identified and rapidly developed to react to performance issues within the business as those arise (have the flexibility to react to ad hoc demands)

This is no different than any business that has flagship products, complimentary products that enhance value, and a pulse on the market for new or customized products that can add value.

Within the context of an enterprise learning function, the linkage with strategic corporate initiatives is normally a function of connecting with senior leaders to discuss strategic initiatives and the development of programs required to achieve the goals of those initiatives. This is often accomplished by having those executives serve on a governing board that can act as the voice of the customer to the learning organization for those long-term strategic enablers. The linkage with line of business or functional day-to-day requirements is normally achieved through discussions with the next level of management through an informal advisory board that keeps the learning organization abreast of the direction of those units or functions on a quarterly basis or other frequency.

Finally, the dynamic assessment of needs and development is achieved through having “feet on the street” inside the business unit, such as a relationship manager who can uncover the needs of the business on a daily basis. Surprisingly, in regards to these, we found:

- The use of governing boards with C-level executives to ensure strategic alignment is fine in theory but has little effectiveness in practice. Sixty percent (60%) of the companies have them to some degree, but only 10% deem them highly effective.
- The use of more tactical advisory boards, while slightly less prevalent (59%), are more useful in that 17% of the respondents deem them highly effective.
- A dynamic process to understand needs as they arise is the most prevalent form of linkage. Seventy-eight percent (78%) have a process to some degree and 22% deem the process highly effective.
- The most effective method of linkage was having a relationship manager. Seventy percent (70%) of all learning organizations have them and 30% deem them highly effective.
- **Bottom line - The business linkage of learning and development dwindles as issues become more strategic. Learning organizations are much more likely to have effective processes at the day-to-day, tactical level of needs analysis than at the strategic level.**

GOVERNING BOARDS WITH C-LEVEL EXECUTIVES (STRATEGIC LINKAGE)

Governing boards with C-level executives (such as the CEO, COO, CIO, etc...) are often touted as a mechanism to ensure strategic alignment between the learning organization and the business. Based on the data, it is clear that the substantial majority (60%) have these to some degree (rated 3-6). It is equally clear that these are highly-effective (rated 5-6) only 10% of the time. While the reason for this is not revealed in the study, CorpU has found, anecdotally, that executives often simply don't consider this a priority. This manifests itself in two ways. In the case of formal governing boards, C-level executives fail to attend a governing board meeting or make only a token appearance. When there is a formal C-level meeting (i.e. not a meeting of the governing board of the learning organizations, but rather a business meeting where learning is on the agenda), the portion of the meeting allotted to learning is often usurped for other causes.

As the chart below indicates, when the threshold is lowered to an effectiveness rating of three or greater (somewhat effective), the percentage of companies indicating that the governing board reaches that level of effectiveness or higher, rises to 33%. This may reinforce the notion that, from the view of the executive, these boards are important as time permits.

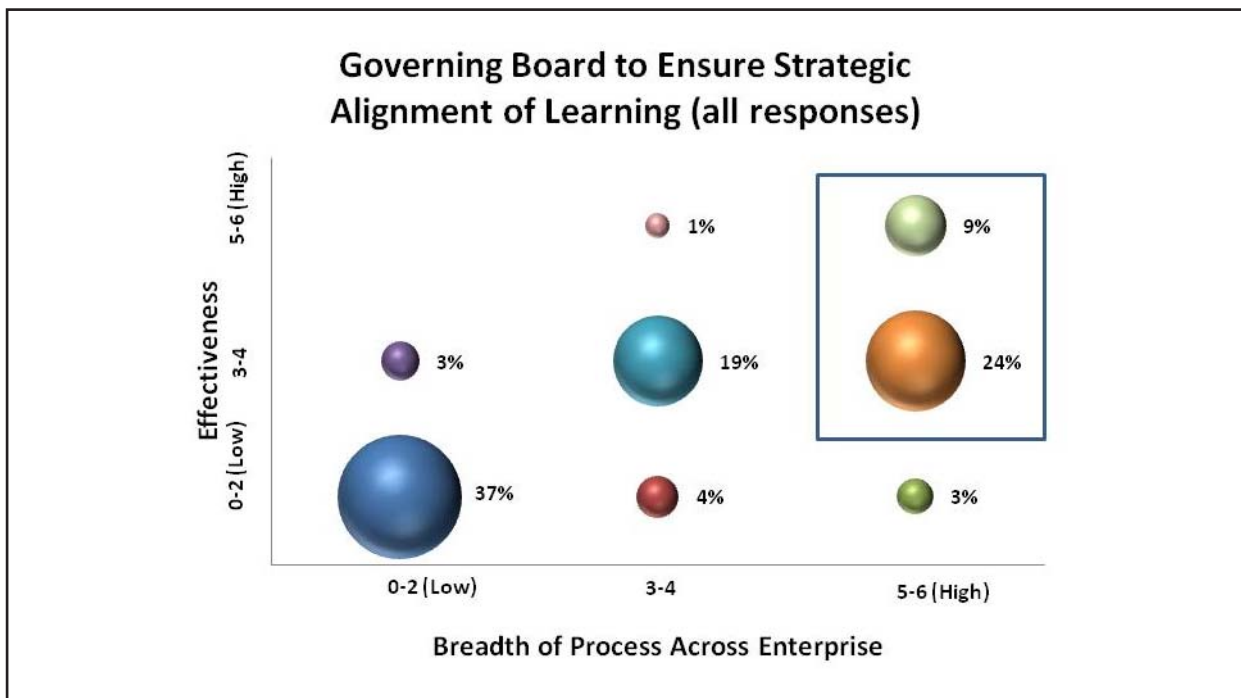


Figure 3. Only 9% of the respondents indicated that they have effective governing boards across all learning organizations while 33% deem them somewhat or highly effective across the enterprise. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

ADVISORY BOARDS (TACTICAL LINKAGE)

In the study, we defined tactical advisory boards as boards, which consist of second level of executives (VPs). We asked questions regarding the existence and effectiveness of advisory boards. In addition to asking if they exist and if they are effective, we asked the degree to which there was a process to have a formal interaction to understand the business needs that would provide input into the selection and prioritization of programs and services.

What is important to note here is that not only are the tactical advisory boards more likely to exist across the enterprise and, simultaneously, to be highly effective (16%), there is much less of a decline in the level of effectiveness between somewhat effective (3-4) and highly effective (5-6) when compared to the governing board, which dropped from 24% to 9% in the same boxed area as indicated on the chart below. This is a function of the fact that the advisory board members are closer to the impact of learning interventions on the business and therefore pay more attention to learning.

Of the companies in the top right bubble of Figure 4, only slightly over half (56%) said that they likewise have effective regular formal meetings with the advisory board to gather input to help prioritize programs that can drive business results. This means that only about 9% (56% of 16%) of all companies that are effective use advisory boards to help prioritize and develop programs that drive business results.

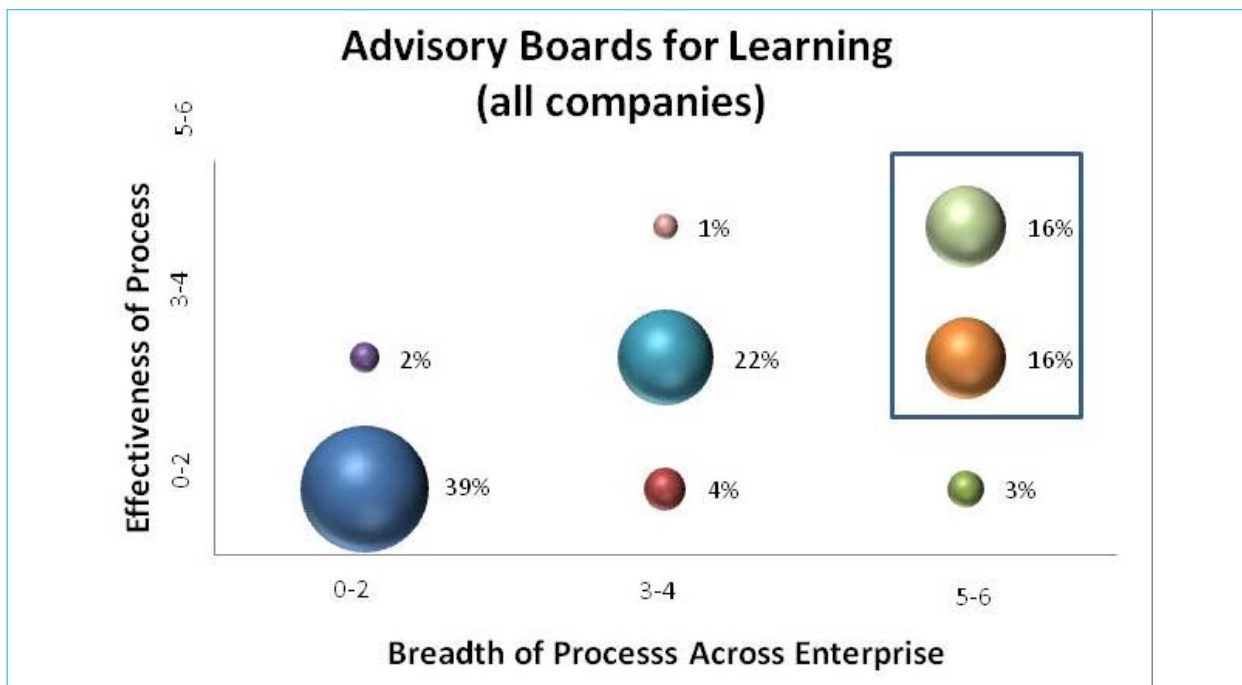


Figure 4. Sixteen percent (16%) of the respondents indicated that they have highly effective governing boards across all learning organizations in the enterprise. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

DYNAMIC PROCESS TO ADDRESS NEEDS AS THEY ARISE (AD HOC LINKAGE)

It is clear from this data that there are many learning organizations that are reactive in nature. Using the same approach, we asked companies that had an effective process across the organization to assess strategies, needs and performance requirements. Not surprisingly, a greater number of companies had this reactionary process in place. Note that among those companies that have the process across the enterprise, the effectiveness increases; and the number of companies that say they are highly effective (5-6) is actually greater than those that say they are somewhat effective (3-4). You will note that when compared to Figure 3 above, these bubbles have actually flip-flopped in size.

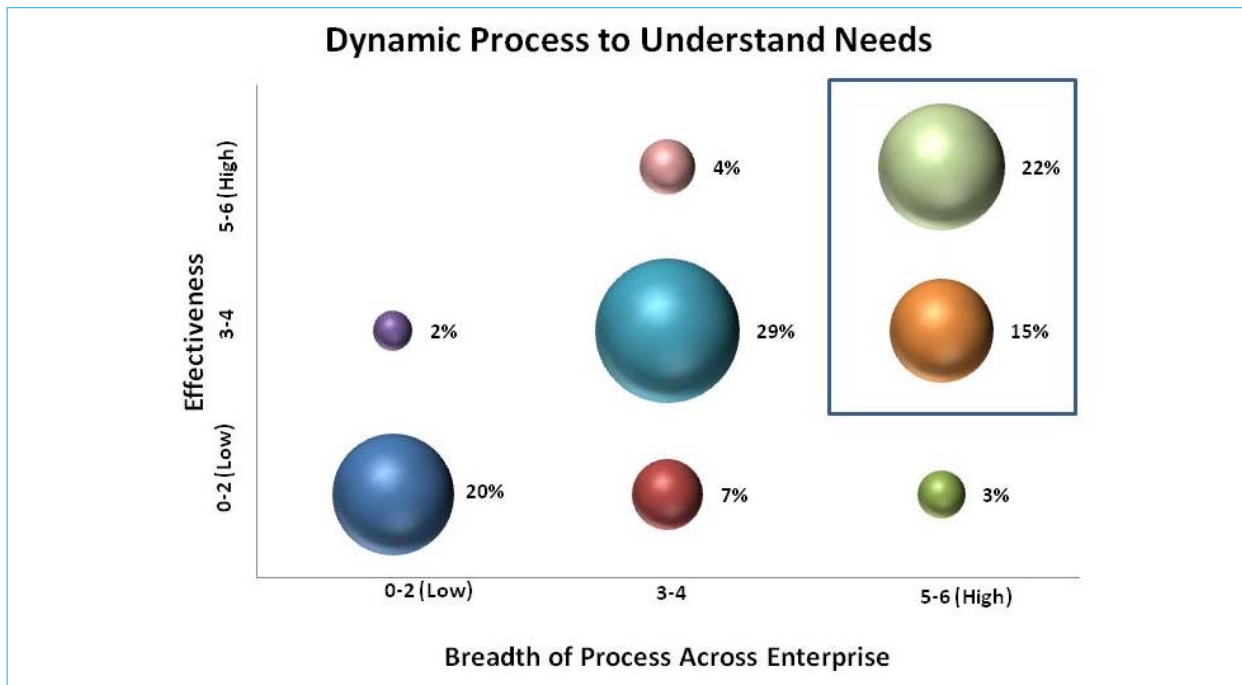


Figure 5. Twenty-two percent (22%) of the respondents indicated that they have highly effective dynamic processes to uncover needs across all learning organizations in the enterprise. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

RELATIONSHIP MANAGERS (UNSTRUCTURED LINKAGE)

As the old saying goes, “when you don’t know what else to do, just throw bodies at the problem”. In addition to determining how many companies had structured governance and processes, we also asked learning organizations if they had the defined role of “relationship manager” that exists to ensure that the business driven learning needs are met. The results of this question should not be surprising to the reader based on the prior data. As the chart below indicates, there is a greater propensity to simply throw resources at the problem and deem that effective. Further, learning organizations that have relationship managers throughout the enterprise are more likely to deem them highly effective rather than somewhat effective by a 2 to 1 margin. You should compare this to Figure 3 in which the ratio was reversed at a margin of 1 to 2.67.

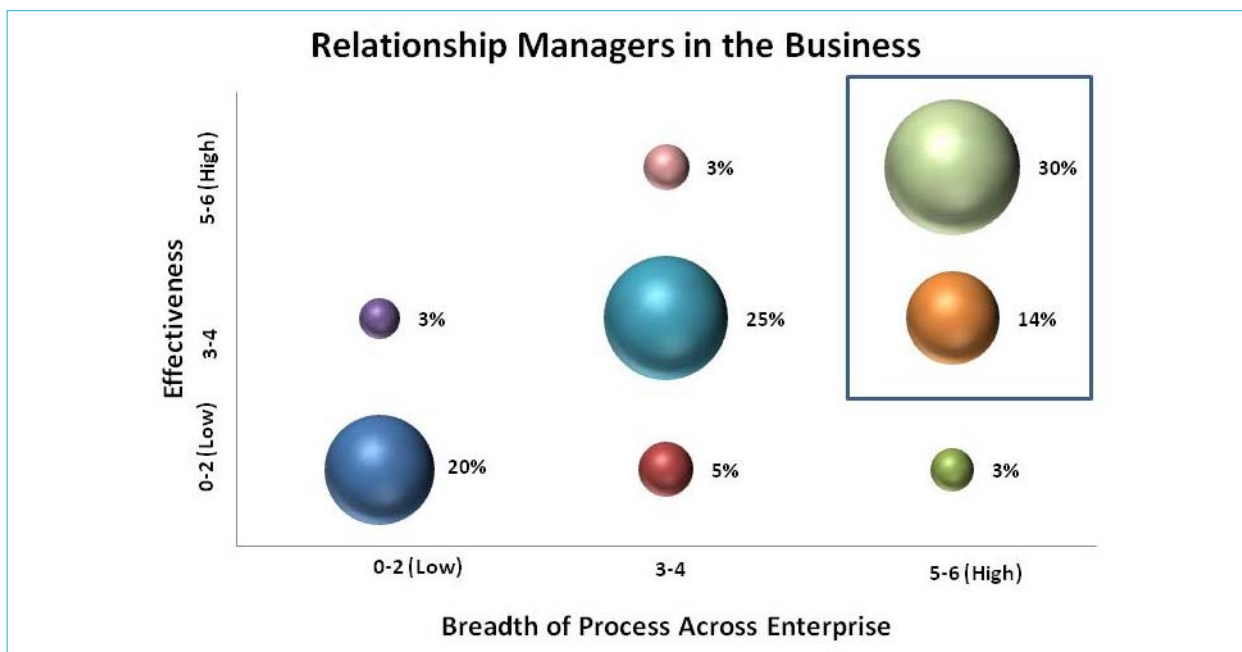


Figure 6. Thirty percent (30%) of the respondents indicated that they have a defined role of “Relationship Manager” to ensure business driven learning needs are met. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

CASE STUDY

One of the best examples of understanding what is important to the business is a process used by Plastipak Academy, the learning organization at Plastipak, Inc., which is a global leader in blow-molded plastic containers. Plastipak Academy aligns with the business by conducting extensive needs assessment discussions with executive leaders early on, and using Impact Maps to assure that learning was linked to business needs. In this manner, Plastipak Academy is able to fulfill its mission to “deliver targeted learning solutions aligned with current business needs, equipping leaders enterprise-wide to grow the business.” A complete case study is included as Appendix A.

A second option is that used by Raytheon, a defense technology company. To support the company’s programs and initiatives, Raytheon’s corporate learning function facilitates an annual needs analysis with all of its business units and corporate functions. The purpose of this process is to identify workforce capability gaps, determine common needs across the enterprise, and enhance the quality, effectiveness and efficiency of current learning offerings, with the broader aim of strengthening alignment across the company. The learning needs analysis is an integral part of Raytheon’s overall business planning cycle, which includes succession management, strategy discussions with the CEO and the senior leadership team, and creation of annual operating plans. This annual cycle informs the enterprise learning strategy and priorities by establishing top-level business objectives, outlining talent implications, and determining investment allocations. A complete case study is included as Appendix B.

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Chapter 3. Business Impact

MEASURING THE VALUE



Chapter 3. Business Impact: Measuring the Value

Measurement has been an often discussed and described aspect of learning and development. Numerous books have been written on how it should be done. Suffice it to say, the efforts of many have still left the issue in a cloud of controversy. Regardless of the merits of the measurement of learning, the measurement of any aspect of business can be broken down into unit measurement and organizational results. In business, the former is metrics and the latter is financial statements. To provide a learning organization corollary to business measurement is to say that there are programmatic measurements (the first three levels of the Kirkpatrick 4 Level model) and organizational performance metrics (business impact or Level 4 of the Kirkpatrick model).

ORGANIZATIONAL MEASUREMENT

In any conventional business, the board of directors, as a governing board, acts as fiduciary for the entire shareholder base. In the discharge of that fiduciary duty, one of the principal activities is to understand the plans and goals for the company and to hold management accountable for performance against those goals. The governing board of a corporate learning function or corporate university is no different. As the chart below indicates, this is hardly the case. Fully one-half of the learning organizations indicated that the process does not exist (and therefore cannot be effective), while only 19% agreed that the process is somewhat or very effective across the enterprise.

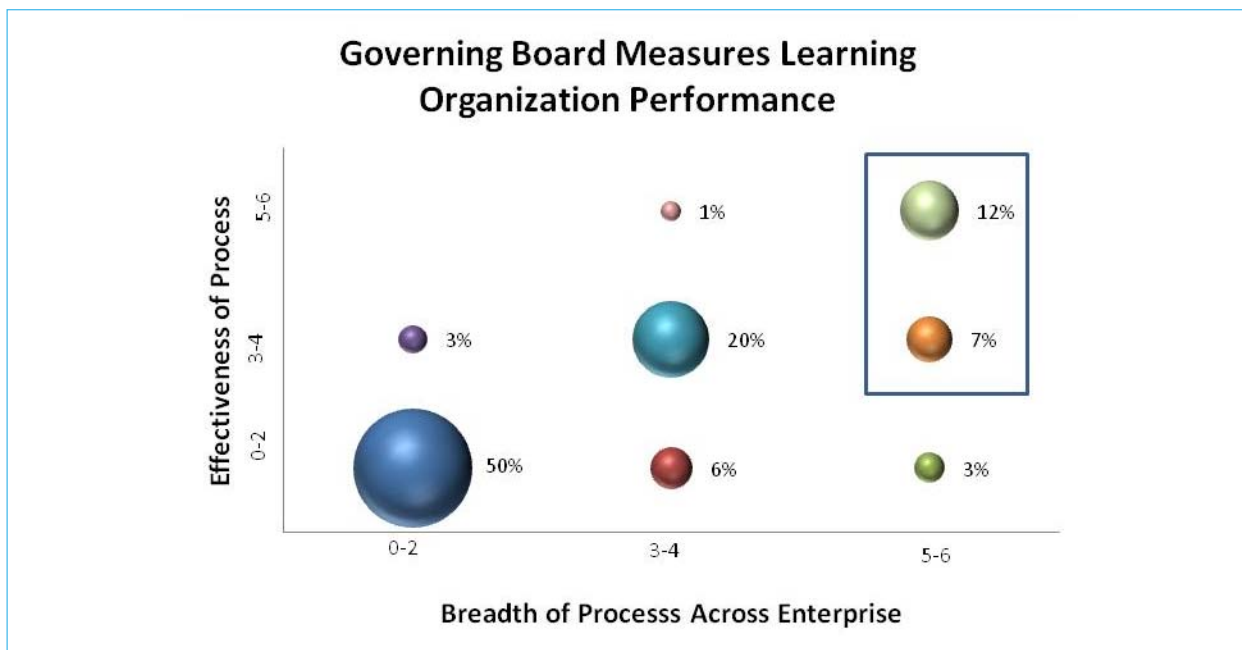


Figure 7. Effective measurement of learning organization performance by governing boards is still a rare occurrence. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

If we filter the data and take into account only those companies that indicated that they had an enterprise-wide governing board(s) for learning (scored a 5 or 6), we still find that only 33% of those boards were deemed very effective at measuring the performance of the learning organization (Figure 8).

If organizational measurement is not necessarily the focus of governing boards, then it is logical to assume that some of the organizational performance reporting is done directly by the learning organization, but is prepared for review by a Senior Vice-President (SVP) of Human Resources (HR) or other line manager in the HR organization. In that regard, we provided the respondents with a list of possible data that was included in an annual report. There were seven options, although we then grouped the options into two major categories: quantitative and qualitative.

With respect to the quantitative metrics, there is still considerable reluctance to depart from traditional training measures, regardless of the size of organization. What may be more astounding is the relatively small percentage of participants who report on all three of the quantitative metric options that were presented (Figure 9). The medium and smaller companies were less likely to report on financial results and programmatic measures (Kirkpatrick 4 Level model). It is likely that, in some of these companies, the budgets and financial reports are simply subsumed into a larger budget and resources may be lacking to effectively implement a measurement system. However, large companies were still astonishingly low across the board.

Effective at Measuring the Performance of the Learning Organization			
	Not Effective (0-2)	Somewhat Effective (3-4)	Very Effective (5-6)
Have Enterprise –Wide Strategic Governing Board (Rated a 5 or 6)	25%	42%	33%

Figure 8. Even broad enterprise governing boards of learning are generally not very effective at measuring the performance of the learning organization.

	>20,000 employees (large)	2,501-20,000 employees (medium)	<2,501 employees (small)	All Companies
Report on traditional quantitative metrics, such as number of students trained and/or number of courses delivered, instructor utilization, etc.	55%	52%	45%	51%
Report on plan to actual financial results	36%	17%	16%	23%
Report on evaluation metrics such as Kirkpatrick's 4 Levels	23%	35%	10%	23%
Report on all three	11%	13%	6%	10%

Figure 9. Quantitative reporting is still limited to traditional training measures in spite of the increased attention that measurement has received over the recent years.

Moving down the chain of measurement from independent assessment (governing board) past quantitative self-report to qualitative self-report, we find that of the seven internal reporting options, three were qualitative. The results are contained in the chart below. Combining the two charts, it appears as though the most prevalent internal reporting is traditional metrics and internally generated success stories (Figure 10). We would probably not consider this running training like a business.

Finally, Figure 11 shows that the most common reporting metrics were traditional training measures and self-reported achievements throughout the year. Our conclusion is that, when it comes to measuring value, not much has changed within training organizations.

	>20,000 employees (large)	2,501-20,000 employees (medium)	<2,501 employees (small)	All companies
Report on significant achievements throughout the year	57%	52%	45%	51%
Report on customer testimonials	26%	22%	16%	21%
Report on anecdotal stories of improved performance	28%	22%	16%	22%
Report on all three	11%	13%	6%	10%

Figure 10. Qualitatively, it appears the predominant reporting method is to toot one's own horn.

	>20,000 employees (large)	2,501-20,000 employees (medium)	<2,501 employees (small)	All companies
Traditional metrics AND self reporting on achievements	51%	48%	41%	46%

Figure 11. The most common pair of quantitative and qualitative data reported in annual reports of learning organizations

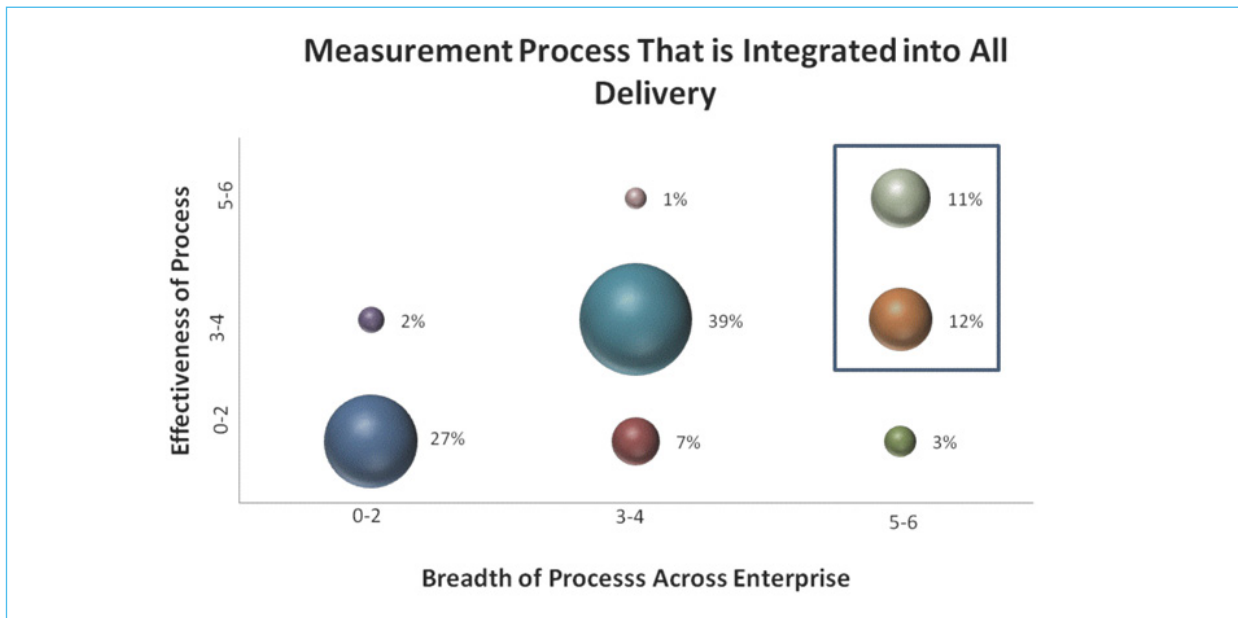


Figure 12. Few respondents have a measurement process that is integrated into all delivery of training. Bubble size is a graphical representation of the percentage of respondents that provided the given answers.

PROGRAMMATIC MEASUREMENT

Given the data described above, one can only hope that the learning organization engages in its own self-reporting on the programs and services it offers. While this is not subject to the lens of an independent overseer, it does provide some insight into the benefit that the learning organization is providing to the business. Unfortunately, this is not the case either (Figure 12).

Finally, we had hoped that, in the absence of a formalized measurement policy at the organization level, there would at least be measurement at the programmatic level of business impact. Generally, while there was some level of measurement in this regard, we still found that a solid majority cannot strongly agree that programs are driven by business goals and are measured by results of those business goals (Figure 13).

SUMMARY

Perhaps the entire state of measuring business impact can be summarized in Figure 14. Simply put, we asked respondents if they provide a competitive advantage to their company and can demonstrate it with quantifiable measures. Not unexpectedly at this point, we once again found that few learning organizations were willing to make that claim.

A case study on measurement is included as Appendix C. In that study, the new Chief Learning Officer (CLO), knew that the learning organization needed to be proactive in educating the company leaders in higher level metrics and demonstrating the value of Global Learning rather than risk having funding pulled during a challenging economy.

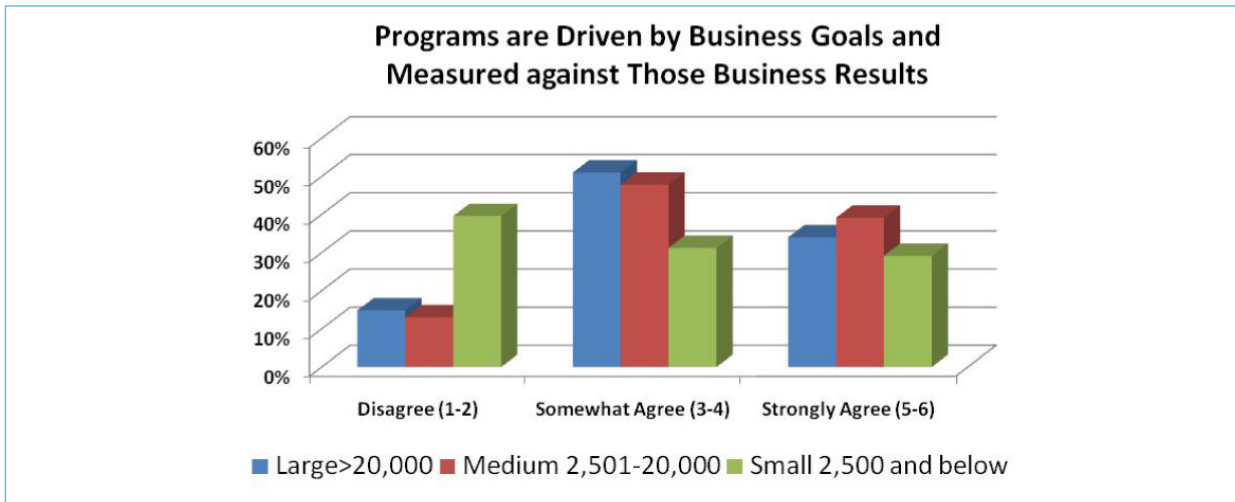


Figure 13. Less than a majority can strongly agree (5-6) that programs are driven by business goals and measured against those business goals.

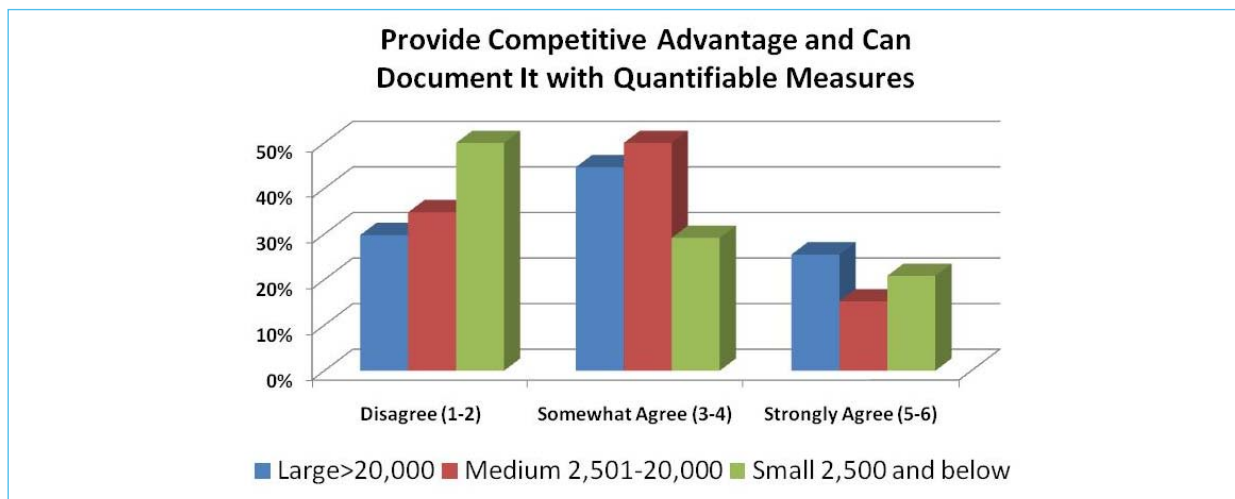


Figure 14. When push meets shove, very few learning organizations can demonstrate with quantifiable measures that they provide their company with a competitive advantage.

Not only did the CLO initiate the creation of a new and improved measurement process in order to capture the impact that Global Learning was having on the business, but she and her team also developed an entire instructional design process that involved stakeholders, performance consulting, strategic alignment, and a strict measurement criteria for prioritizing learning initiatives that required that the programs either project causal impact or correlation impact on business results.

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Chapter 4. Delivering the Goods:

SCALABILITY AND PROJECT MANAGEMENT METHODOLOGY



Chapter 4. Delivering the Goods: Scalability and Project Management Methodology

Everyone has heard the business mantra “it has to be scalable and repeatable”. Running an internal learning organization is no different. Everything from the design of programs through debriefing with the “customer” after the program has been completed should be done in a systematic and repeatable way.

Similarly, the components that enable scalability must be in place. This includes a core learning technology infrastructure that can scale and accommodate both formal and informal learning. On the people side, there must be systems and processes in place to recruit, train, compensate and retain learning professionals. If these elements are in place, learning organizations can easily scale up efforts in a systematic and efficient manner to meet the ever-changing demands of the business.

In addition to being scalable and repeatable, any organization that engages in activities that are primarily professional services focused, which would include the design, development and delivery of learning programs, must utilize a project management methodology. At its highest level, this methodology serves to ensure that the end results meet customer’s expectation and is delivered on time and on budget.

From a supply chain perspective, it also means that supplier and third party vendors of end products are managed in a manner that provides the same quality of service as the internal organization.

In our survey, we asked about many of these processes. As with other processes, we asked respondents to rate the degree to which the processes exist across the enterprise and the degree to which those processes are effective, both on a one to six scale. Set forth below is a table that shows the percentage of respondents that indicated the process is executed across the enterprise by the learning organization(s) (scored a 5 or 6) and the degree to which the processes are either highly effective (5-6), or somewhat effective (3-4). As with the prior graphs, we would consider these two results as upper quadrant performance.

Many of these processes are discussed in more detail later in this chapter. However, a ranking of those processes based on upper quadrant performance is as set forth in the table below (Figure 15).

One of the more interesting things to note is that, once again, processes involving measurement (of vendors and of performance against expectations) scored dramatically lower than the other processes, which serves to validate the conclusions drawn in our chapter on measurement. Further, conducting debriefs with customers, another method of measurement, was also toward the bottom of the list. Specifically, measurement is either not a priority or a core competence of the learning function. All processes around design and deliver were generally in the upper quadrant for one quarter to one third of the respondents.

<u>Process</u>	<u>Exists Across Enterprise (5-6) & Highly Effective (5-6)</u>	<u>Exists Across Enterprise (5-6) and Somewhat Effective (3-4)</u>	<u>Total Upper Quadrant</u>
A method to deliver the training event (or other intervention) according to specifications described in a written design document	26%	16%	42%
A consistent architecture for the design and development of programs/courses	22%	16%	38%
An integrated system to manage all of the learning resources required for delivery of programs/courses (i.e. registration management, materials fulfillment, facilities management, instructor management)	21%	13%	34%
A system to develop and manage budget and timeline for all product and service offerings to ensure delivery on time and within budget	24%	5%	29%
A system of orientation, compensation, management, and employee development for training staff	18%	10%	28%
A process to develop and propose training or performance improvement options linked to desired results that include customer authorization to proceed	16%	11%	27%
A process to debrief with customers after the project to capture lessons learned	16%	11%	27%
A single, centralized function for the development and management of an IT infrastructure to support both formal and informal learning	13%	13%	26%
A method to capture project expectations from customers and measure performance against those expectations	11%	7%	18%
A consistent process to evaluate, select, and measure the performance of external vendors	6%	8%	14%

Figure 15. A ranking of the core process around delivering learning programs and services based on the effectiveness of the process across the enterprise

Company Size (employees)	A single, centralized function for the development and management of an IT infrastructure to support both formal and informal learning		
	Exists Across Enterprise (5-6) & Highly Effective (5-6)	Exists Across Enterprise (5-6) and Somewhat Effective (3-4)	Total Upper Quadrant
Large >20,000	13%	19%	32%
Medium 2,501-20,000	15%	15%	30%
Small <2,501	10%	6%	16%

Figure 16. Although small companies are much less likely to have an effective centralized learning technology infrastructure, it is still surprising that only about one third of the larger organization can make the same claim.

One of the more intriguing results was the fact that so few respondents that had an enterprise-wide IT infrastructure indicated that the infrastructure was effective. We thought perhaps that this may be the result of size of organization. While smaller companies are clearly less likely to have a core learning technology infrastructure, only about one-third of larger companies reached upper quadrant status (Figure 16).

The same can be said for the process to debrief with customers. Small companies are much less likely to effectively engage in the process across the organization, but it is still surprising that only about one-third of the large companies execute the process effectively across the enterprise (Figure 17).

Finally, we looked at vendor management results. It is clear that smaller organizations would be less likely to have a formal process since the numbers of vendors are probably limited. However, we were shocked to find that medium sized and larger companies are still not inclined to have a robust process to manage vendors (Figure 18).

Company Size (employees)	A process to debrief with customers after the project to capture lessons learned		
	<u>Exists Across Enterprise (5-6) & Highly Effective (5-6)</u>	<u>Exists Across Enterprise (5-6) and Somewhat Effective (3-4)</u>	<u>Total Upper Quadrant</u>
Large >20,000	23%	11%	34%
Medium 2,501-20,000	13%	13%	26%
Small <2,501	10%	10%	20%

Figure 17. Debriefing with customers contains the same trends as other efficiency processes.

Company Size (employees)	A consistent process to evaluate, select, and measure the performance of external vendors		
	<u>Exists Across Enterprise (5-6) & Highly Effective (5-6)</u>	<u>Exists Across Enterprise (5-6) and Somewhat Effective (3-4)</u>	<u>Total Upper Quadrant</u>
Large >20,000	11%	9%	19%
Medium 2,501-20,000	2%	2%	4%
Small <2,501	6%	2%	8%

Figure 18. Companies of all sizes are not very likely to have effective enterprise-wide management for learning vendors.

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Chapter 5. Funding and Spending



Chapter 5. Funding and Spending

We analyzed the funding in a variety of ways. First, we looked at funding models to determine the degree to which learning organizations were running training like a business, which is to say charging people for their services. Then we tried to determine if there was any correlation between funding models and the companies that thought the learning was efficient and effective. Next, we took the same approach with regard to the management of the spend to determine if there was any type of spend management that correlated to efficient and effective learning organizations. Finally, we looked at where the money was being spent to determine what companies were spending on the strategic processes (strategic alignment and measuring business impact) versus the tactical processes (developing and delivering programs).

HERE IS WHAT WE FOUND.

We broke funding models into four categories as follows with the percentage of respondent in each category in parentheses:

- **Model 1.** Corporate allocation with no chargeback (40%)
- **Model 2.** Corporate allocation with a full chargeback regardless of use (11%)
- **Model 3.** Partially allocated regardless of use and partially charged back based on use (33%)
- **Model 4.** Full chargeback to the business based on use (16%)

These four categories can be grouped into two larger categories (Models 1 & 2 and Models 3 & 4), which split 51% to 49%. The first two categories are ones in which there is really no buying decision and the latter two have some level of buying decision by the business units. Using these two larger groups, we discovered from an efficiency and effectiveness perspective (agreed to some degree, 4-6 on a scale of 6 that the learning organization drove efficiency or effectiveness as the case may be) that funding models were pretty much irrelevant as a determinant of efficiency and effectiveness (Figure 19).

Continuing along this vein, we looked at the impact of funding models in a few other variables. First, we looked at whether those with funding models that involved a buying decision were more likely to be able to demonstrate value since a buying decision helps create a notion of value. Contrary to what we expected, there was a greater likelihood

Funding Models	% that say they are generally efficient (Scored 4-6)	% that say they are generally effective (scored 4-6)
No Buying Decisions (Models 1 and 2)	57%	51%
Buying Decisions (Models 3 and 4)	52%	47%

Figure 19. Funding models generally do not have any impact on efficiency and effectiveness.

that those with funding models that did not involve buying decisions could demonstrate value to the business with quantifiable metrics. We also tested the hypothesis of whether those organizations that had funding models based on buying decisions would be more likely to be driven by business results, since the business unit is effectively paying for those results. Again, we were surprised to find that this was not the case (Figures 20).

We then looked at the management of spend under the same lens. We asked respondents to rate the degree to which the spend for learning and development is managed centrally on a scale of one to six. We then cross-tabulated those answers against the efficiency and effectiveness ratings. Interestingly enough, those that are more likely to have a centralized management of spend also believe they are more effective and efficient than those with a more decentralized management of spend (Figure 21).

With regard to where the money is being spent, not much has changed over the past decade. One of the contentions in RTLAB was that the most valuable activity a learning organization can undertake is understanding the needs of the business and measuring the extent to which the learning programs are having an impact on the business. In 1999, the amount of time and money spent on those activities was fairly small and that continues to be the case.

Funding Models	% that say they can demonstrate value to business with metrics (Scored 4-6)	% that say they are driven by business goals and measured by business metrics (scored 4-6)
No Buying Decisions (Models 1 and 2)	36%	42%
Buying Decisions (Models 3 and 4)	20%	34%

Figure 20. Funding models generally do not have much of an impact on efficiency and effectiveness.

Central Management of Spend	% that say they are generally efficient (Scored 4-6)	% that say they are generally effective (scored 4-6)
Mostly Centralized (rated 4-6)	80%	72%
Less Centralized (rated 1-3)	30%	28%

Figure 21. Centralized management of spend has a substantial impact on efficiency and effectiveness.

As the following tables suggest, the investment of time and money remains focused on design, delivery and administration and operations (Figure 22). The small difference between the median time spent on delivery and administration/operations and the median percentage of budget spent on those activities is that the respondents indicated that technology hosting/administration and program delivery are the most common outsourced activities.

% of Time by Spent Activity			% of Budget Spent by Activity		
Activity	Mean	Median	Activity	Mean	Median
Needs Analysis/Performance Consulting	14%	10%	Needs Analysis/Performance Consulting	10%	10%
Program Design	24%	20%	Program Design	23%	20%
Program Delivery and Other Services	34%	30%	Program Delivery and Other Services	39%	40%
Administration and Operations	19%	15%	Administration and Operations	21%	20%
Measuring and Analyzing the Business Impact	8%	6%	Measuring and Analyzing the Business Impact	7%	5%

Figure 22. Very little time and money is spent on needs analysis and measurement which the book “Running Training Like Business” rates as the highest value activities.



Appendix A. Plastipak Case Study:

ALIGNING LEARNING, BUILDING TRUST



Appendix A. Plastipak Case Study: Aligning Learning, Building Trust

CHALLENGE

Rapid growth and a complex business landscape resulted in the CEO making it a top priority to cultivate leaders to meet the new challenges and opportunities in front of them. Addressing this corporate imperative first required a shift in company mindset to viewing learning as a strategic lever tightly aligned to current business needs.

SOLUTION

Plastipak Academy was established as a corporate learning unit with a vision to be a proactive, strategic business partner. By conducting extensive needs assessment discussions with executive leaders early on and using Impact Maps to assure that learning was linked to business needs, the Academy was able to fulfill its mission to “deliver targeted learning solutions aligned with current business needs, equipping leaders enterprise-wide to grow the business.”

RESULTS

Plastipak Academy programs drive measurable business results. The Academy’s keys to success include involving high-level executives in planning programs and defining outcomes, and implementing a learning-to-results process that engages executive sponsors, supervisors, and participants in obtaining the desired results. Changes in critical business metrics include faster cycle times, reduced material costs, higher retention, and improved team performance.

PLASTIPAK CASE STUDY: ALIGNING LEARNING, BUILDING TRUST

Plastipak Packaging, Inc., is a privately-held, global, \$2-billion manufacturer of blow-molded plastic containers. Customers rely on its products to advance their position in markets including food and beverage, consumer cleaning, industrial and automotive, and health and personal care. Key executive leaders ran machines in the first facilities and helped build the company from the ground up over the last 40 years to the successful, global organization it is today.

Prompted by rapid growth and a vision for enabling company leaders to manage the resulting challenges and opportunities, the company president and CEO, William C. Young, gave the directive to establish a corporate university, targeting current and emerging leaders. In March 2006, Plastipak Academy was launched. The Academy was a new initiative, not a repackaged learning and development function. It was designed to provide fresh, unique channels – carefully aligned with current business needs – to broaden and sharpen the critical skills of the 1,000 associates who lead people or processes.

Viewing the Academy as a “business partner” first and “learning provider” second represented a change in company mindset. Plastipak Academy took active steps toward building trust with its top leaders by connecting learning to business results and obtaining visible support from those leaders (see box, Support for Learning). These actions helped tie Academy programs explicitly to improving the business, resulting in continued implementation of learning initiatives even amidst organizational cost-cutting efforts due to recent, difficult economic times.

This view of learning as a business driver has strengthened Plastipak Academy alignment, positioning it beyond a highly competent and respected learning unit to one that is used as a strategic lever for improved organizational capability. The first step the Academy took following its launch was to conduct an initial needs assessment. This assessment involved one-on-one conversations with 26 top leaders to identify business – not necessarily learning – challenges (see the CorpU publication on Needs Assessment for details).

SUPPORT FOR LEARNING

CONNECTING LEARNING TO BUSINESS RESULTS

Before a learning event, participants target specific business issues they'll use the program to improve. After a learning event, they apply what they learned to achieve targeted results, document their experience, and share it with a supervisor during a post-training dialog. Only after completing the learning-to-results process do participants receive a recognition certificate, delivered by their site manager or supervisor.

OBTAINING VISIBLE SUPPORT FROM TOP LEADERS

Each program is sponsored by a business executive. In addition, executives, regional managers, and site managers hand-select participants based on performance goals, hand-deliver pre-event materials, regularly contribute to program design, and serve as facilitators or enroll as learners. Also, first-time participants receive a personalized, signed letter from Plastipak's CEO expressing his support for their professional growth.

The needs assessment process for gathering strategic learning priorities helped moved the needle on the internal client viewpoint. It identified critical business needs, and put the portfolio of business needs into one place. This enabled business leaders to identify and prioritize the learning needed, and enabled the Academy to start building its portfolio of programs to meet the most critical of those needs. This needs assessment phase set the stage for the work that resulted in the Academy's recognition as a contributor to business success.

DEVELOPING ENGAGED STAKEHOLDERS

The initial needs assessment work identified business challenges that learning could address, and helped to determine priorities. That made it possible to deliver learning solutions that are aligned with corporate goals, and that is critical to strategy integration. But to ensure business impact from those programs, every stakeholder in the learning process needed to internalize that alignment.

To drive strategic change throughout the organization, the Academy guides stakeholders to be actively engaged in doing the right things, not just supportive of them (Figure 1). Active engagement is achieved by embedding a learning-to-results process into Academy programs. Ten Plastipak learning and business associates were certified in the high-impact process developed by Dr. Robert Brinkerhoff, who facilitated the first day of the certification program. The Academy customized a program and tools, including Impact Maps, to connect learning outcomes to business goals, and uses the tools in tailored ways with different stakeholder groups.

EXECUTIVES

The needs assessment process defined the most critical areas for the Academy's portfolio. Business leaders have changing needs, however, and regularly request training to solve a business problem. When a leader suggests the need for training, the Academy Leader, Diane Hinton, deliberately and systematically refocuses the conversation using an Impact Map process to define business outcomes, the first step in The Six Disciplines of Breakthrough Learning (The Six Disciplines of Breakthrough Learning: How to Turn Training and Development Into Business Results. Calhoun W. Wick, Roy V.H. Pollock, Andrew McK. Jefferson, Richard D. Flanagan. Pfeiffer 2006). Executives help build and approve Impact Maps to reflect the actual business case and success metrics, ensuring program alignment.

The Academy Leader helps the business leader identify relevant, critical business results and how they will know if the results have been achieved.



Figure 1. Successful learning requires that everyone be actively engaged.

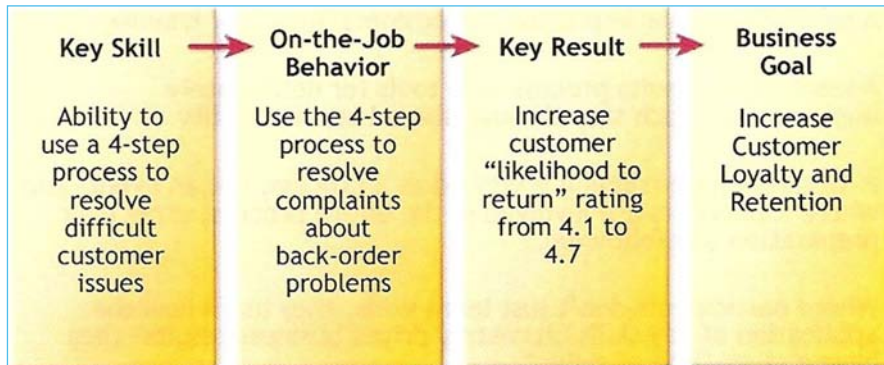


Figure 2. Plastipak Academy works with internal clients to determine what key skills will lead to desired results. This simplified, generic example shows the link between a key skill and a business goal for customer service staff.

Then, the Academy Leader and business leader drill down to the vital behavior gaps, and finally, the learning needs (Figure 2). This “impact mapping” is how the Academy collaborates with all internal clients to ensure alignment to the business. The Impact Map data is then presented to Academy governance to shape priorities.

Whether an internal client’s learning needs are served through the Academy or not, the Academy still provides an important service as a business partner by helping them define needs, linking the needs to business results, and seeing the clear business value of learning initiatives. As a result of these conversations, the leaders are more proactively thinking about leveraging learning for business impact in organizational capability planning.

SUPERVISORS

To strengthen accountability in driving strategic change with its programs, Plastipak Academy implemented a program called High-Impact Learning and You for supervisors of direct reports that would be attending an upcoming program. The VP of Operations, Ed Morgan, fully supports this effort, sending email messages directly to supervisors. He also recorded the Academy’s first-ever podcast to advocate for high-impact learning. In this program, supervisors learn and practice their role in helping the company leverage training to drive business results. The program emphasizes how engaging in their direct reports’ learning helps them achieve their own performance goals, a key to overcoming any objection about how their involvement adds an additional administrative burden. Figure 3 shows the Impact Map from that program.

Impact Map for High-Impact Learning and You
Role: Learner's Supervisor

Key Skills and Knowledge <small>The particular learning outcomes most important for you to acquire.</small>	On-the-Job Applications <small>The few most important ways you can use the learning to produce key results most needed to achieve business goals.</small>	My Key Results <small>The few most important immediate job results that can help produce business goals and can be achieved by applying the learning.</small>	Unit/Department Goals <small>The few unit goals that will be driven by the key results and will contribute to corporate goals.</small>	Corporate Goals <small>The business impact you can best contribute to by applying the learning.</small>
<p>Explain how high-impact learning is translated into improved individual and business performance.</p> <p>Use an Impact Map to increase and clarify the business linkage to training.</p> <p>Facilitate one-on-one time with trainees before and after training to communicate what to learn and how to apply learnings to drive key results.</p> <p>Set performance goals with trainees for applying their learning to drive business results.</p> <p>Coach trainees and address obstacles for driving improved performance after training.</p>	<p>Assess the likely business payoff of potential training for your associates.</p> <p>Link your associates' training to your unit and overall business goals.</p> <p>Help your associates prepare for training so they have clear goals that meet your and their expectations.</p> <p>Help your associates set clear and reasonable action plans for converting their learning into performance that makes a difference.</p> <p>Follow up with your associates after training to ensure skill application and alignment to your business needs and expectations.</p>	<p>My associates are able to articulate the clear line of sight from training outcomes to business results.</p> <p>My associates have personal impact maps for training that address my unit's key business needs.</p> <p>My associates execute personal action plans after training and hold themselves accountable for improving key behaviors that drive results that matter.</p> <p>My associates indicate that support and coach them to help improve their job performance after training.</p>	<p>Improved associate performance needed to achieve business goals.</p> <p>Increased alignment of associate performance with business needs and goals.</p> <p>Increased returns for learning and training expenditures.</p> <p>Reduced training "scrap and waste."</p> <p>Improved associates ability to guide their own learning and performance and link to business results.</p>	<p>Increased productivity and achievement of results.</p> <p>Improved overall organization performance and results.</p> <p>More capable and resilient workforce.</p> <p>Improved associate engagement and retention.</p>

Figure 3. The Impact Map shows the critical links between skills and goals and can be used as a guide for participants, instructors, supervisors, and business leaders (© Advantage Performance Group). Plastipak Academy developed this particular Impact Map for the supervisor's course, High-Impact Learning and You. The circles indicate one participant's line of sight into those links.

PARTICIPANTS

Participants target personal skill and behavior gaps on an Impact Map and build a line of sight to the business goals they would affect by improving their performance. Participants discuss their goals with their supervisors before and after the program. Post training, participants and supervisors, build an action plan for using what they learned to improve the targeted key results.

FACILITATORS

Facilitators tie their teaching to the business goals and results on the Impact Map and ask participants to revisit their Impact Maps during learning events. At the start of each program, facilitators ask participants to use the Impact Map to frame their introduction to other participants using their personal goals and the business goals. This not only reinforces the participants' goals, but also enables facilitators to properly orient the course to match those goals. At the end of each program, the facilitator and participants develop an action plan based on those goals. As part of that process, each participant is asked to identify the obstacles that could make it hard to implement the action plan and accomplish the goals. The full list of obstacles is then compiled and sent to supervisors.

FROM TRAINING PROVIDER TO BUSINESS PARTNER

Since launching, Plastipak Academy has hosted facilitator-led events for associates representing all of its U.S. sites and two sites in Brazil. Data has been collected tying every program to improved business results. Participants cite specific work examples that, in their words, improve safety, productivity, product quality, troubleshooting/problem-solving, teamwork, associate retention/engagement, and customer satisfaction/relationships as a direct result of attending Academy programs (see box, Some Results).

Plastipak Academy ties learning needs to business goals with the help of top leaders who understand industry and marketplace trends, competitive gaps, customer needs, and performance gaps. Executive program sponsors to whom the goals are most front-of-mind further define and approve them. Learning is made to explicitly serve those business goals and all stakeholders are aligned to accelerate organizational capability where it matters. Success is measured against business results to determine program effectiveness, not against learning outcomes. These alignment activities have enabled Plastipak Academy to strongly and consistently help drive strategic change and build a common culture, strengthening its reputation as a capability resource for business excellence.

Some Results

The following two programs indicate the type of business impact that the Academy brings to Plastipak due to (1) the learning-to-results process, (2) rigorous program development, (3) impactful and immersive delivery, and (4) executive and managerial involvement.

Advanced Injection Setup and Processing

- Sponsor:** VP of R&D
- Business Case:** To advance the company's aggregate technical capability in injection molding processing, best practices in setup and troubleshooting needed to be identified.
- Description:** An advanced program enables experts company-wide to learn and discuss best practices while troubleshooting real issues they bring to the program.
- Business Impact:** All participants reported business improvements such as reduced cycle time, improved product quality, and improved processing, including those who attended the Academy's first global program in Brazil.

Crucial Confrontations

- Sponsor:** VP of Operations, VP of Talent Management
- Business Case:** Data from the Lominger Leadership Architect revealed weaknesses in leaders' accountability/conflict management skills, creating vulnerabilities in talent management and problem solving.
- Description:** A conflict-management program enables leaders to handle confrontations that lead to productive results.
- Business Impact:** A full evaluation of program effectiveness was conducted using the Success Case Method. The study revealed 93% of participants have achieved or expect to achieve business results due to the program, particularly in the areas of associate engagement and retention, team productivity, and safety.

PLASTIPAK ACADEMY

Plastipak Academy is a centralized corporate learning unit that operates through business partnerships with executive and top leaders to serve critical business needs. It is managed by an Academy Leader who has reporting relationships to the Executive VP of Operations and the VP of Talent Management. Together, they establish Academy strategy, direction, and resourcing.

The Academy Leader obtains a deep knowledge of organizational capabilities, threats, and needs by actively nourishing business relationships with a network of top leaders from multiple areas (i.e., Operations, R&D, Talent Management, Sales, Accounting, and Finance). Moving the learning dialog from “training needs” to “business needs” has enabled the Academy to establish a governance structure with those executives who now collaborate with the Academy Leader to identify, set, and fund priorities.

A small group of highly skilled learning professionals that have worked together for 14 years make up Plastipak's corporate learning unit. This group manages Plastipak Academy and other key initiatives identified by executive leadership. It also develops new-hire technical training that captures best operating and troubleshooting practices on Plastipak's proprietary equipment and processes. One essential aspect of their business model involves using highly collaborative techniques to accelerate the implementation of effective learning initiatives. This includes using key elements of Leaders as Teachers when partnering with internal, seasoned content experts to develop, facilitate, deploy, and evaluate programs.



Appendix B. Raytheon Case Study:

AN INTEGRATED, ANNUAL PROCESS FOR ALIGNING LEARNING WITH BUSINESS STRATEGY



Appendix B. Raytheon Case Study:

An Integrated, Annual Process for Aligning Learning with Business Strategy

CHALLENGE

As a defense technology company with thousands of programs in its portfolio and an aggressive international growth strategy, Raytheon Company prides itself on operational and performance excellence, customer success and flawless execution. To meet its growth goals, Raytheon must understand the competitive landscape, develop innovative solutions for new and existing customers, and constantly adapt in a complex geopolitical and business environment. The company must also develop talent that possesses the skills and capabilities needed to meet complex challenges.

SOLUTION

To support the company's programs and initiatives, Raytheon's corporate learning function facilitates an annual needs analysis with all of its business units and corporate functions. The purpose of this process is to identify workforce capability gaps, determine common needs across the enterprise, and enhance the quality, effectiveness and efficiency of current learning offerings, with the broader aim of strengthening alignment across the company. The learning needs analysis is an integral part of Raytheon's overall business planning cycle, which includes succession management, strategy discussions with the CEO and the senior leadership team, and creation of annual operating plans. This annual cycle informs the enterprise learning strategy and priorities by establishing top-level business objectives, outlining talent implications, and determining investment allocations.

RESULTS

The learning organization has a definitive seat at the table in Raytheon's annual strategic planning process, cementing its role as a major contributor to the company reaching its business goals. By linking business strategy and people strategy, company leaders achieve a holistic view of where Raytheon is going, what workforce capabilities are needed to get there and what gaps need to be closed. This enables leaders to determine which needs are best served through the development of a learning solution, which require a talent acquisition or talent management strategy, which call for an organizational effectiveness intervention, and when a blended approach is most appropriate. An integrated approach allows Raytheon to expediently place the right people with the best skills into the most appropriate jobs at the right time, at a reasonable cost.

RAYTHEON CASE STUDY: AN INTEGRATED, ANNUAL PROCESS FOR ALIGNING LEARNING WITH BUSINESS STRATEGY

At Raytheon, the primary mission of learning and development is to develop individual capabilities in order to increase organizational capacity, thereby enabling the company to meet its strategic business objectives. These objectives include protecting and growing its position in core defense markets as well as expanding its presence in domestic and international growth markets. To meet new challenges while continuing to execute with speed and predictability, Raytheon must have the talent and skill sets in place to adapt and succeed in a volatile marketplace. **THE OPERATIONAL MODEL AND PROCESSES**

Raytheon's operational model and processes in learning are designed to support and enable the company to meet its strategic objectives. As a matrix organization, integrating and reconciling the needs of the businesses and functions, as well as the company as a whole, is a critical exercise. Raytheon's learning organization uses strong governance and process discipline practices to "run learning like a business" and ensure transparency and efficiency.

GOVERNANCE AND OVERSIGHT

The Learning Governance Board, which is made up of the Chief Learning Officer, business presidents, and function vice presidents, provides general oversight of learning at Raytheon. The board's charter is to validate enterprise learning priorities and spending allocations, ensure alignment with Raytheon's overall strategy and ROI, sponsor and support initiatives, communicate with their peers on the senior leadership team to ensure their understanding and commitment, and periodically assess the performance of the learning organization. The board meets face-to-face three times a year, with teleconferences and written updates in between. In addition to overarching direction from the enterprise Learning Governing Board, the businesses and functions also have learning governance boards, learning councils, and learning champions to provide sponsorship and oversight.

CORPORATE LEARNING ORGANIZATION

Raytheon's learning organization is part of corporate Human Resources. The learning organization is responsible for aligning learning resources with the needs of the enterprise, driving culture change, inspiring innovative thinking that enables business growth, creating a positive experience for stakeholders, learners, instructors and vendors, and ensuring financial transparency and measurable business impact.

The learning organization is led by the Chief Learning Officer, who reports to the Senior Vice President of Human Resources. Each of Raytheon's businesses and functions has a dedicated learning leader that represents its learning needs and provides strategic and operational leadership for learning. The business learning leaders partner with the business presidents and Human Resources vice presidents to create a learning strategy for each business. Likewise, the functional learning leaders work closely with the C-level function vice presidents. Cross-enterprise focus areas, including leadership development, program leadership, and Raytheon Six Sigma, also have dedicated learning leaders. Operations focus on maintaining process excellence, establishing consistent standards, introducing new learning technologies, as well as overseeing the Learning Management System. A finance leader and a communications leader also report to the CLO.

To facilitate communications, the learning organization has established the Global Learning Network, a community of practice consisting of 200+ learning professionals across the enterprise. They have a well-regarded monthly "gathering" that enables learning professionals to understand what's going on in the world of learning and development, share best practices, and hear internal and external perspectives.

STRATEGIC LEARNING NEEDS ANALYSIS PROCESS

A primary objective of the learning organization's annual strategic learning needs analysis process is to strengthen alignment. This includes aligning the enterprise learning strategy to overall company strategy, as well as more closely aligning the business and functional learning goals and priorities to the overall business and function strategies. The process steps that go into the development of the learning plan are shown in Figure 1. In addition to the high-level processes shown, the plan is also informed by Raytheon's Integrated Learning Development System, a consistent gating process used to analyze, develop, deploy and evaluate learning across the enterprise.

The learning needs identification process is based on a common methodology, leverages common templates and is consistently implemented across all of the businesses and functions. Outputs are also common: learning plans for each business and function, which feed into a plan for the enterprise. Senior leadership engagement is a vital part of the process; each learning plan is reviewed and signed off by the respective business president or function leader as well as the HR leader. The businesses and functions share their findings in a day-long session, which results in a short list of common priorities that are reviewed and approved by the Learning Governing Board.

These priorities make up the enterprise learning plan. The priorities are scoped into proposed solutions, and they become the primary focus of the corporate learning organization for the following year. Members of the Learning Governing Board also serve as executive project sponsors throughout the year, supporting the enterprise learning solutions and bolstering key messages and communications across the enterprise.

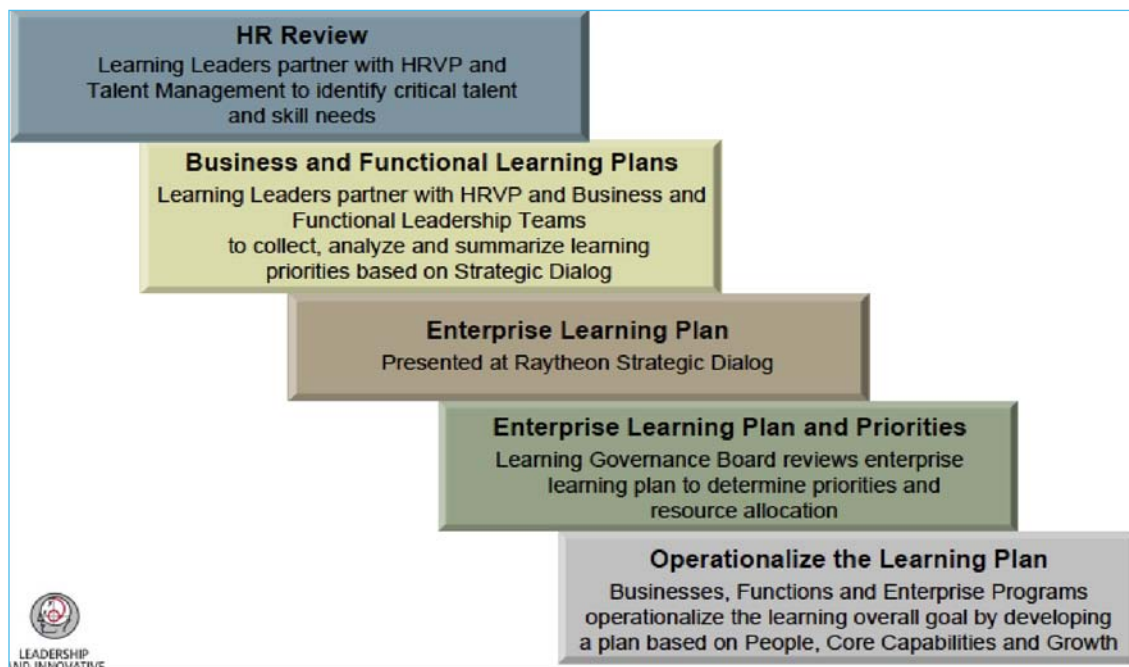


Figure 1. Raytheon's high level learning needs analysis process assures that Learning function delivers the right learning, to the right people, in a timely and effective way.

LINKAGE TO RAYTHEON'S ANNUAL BUSINESS PLANNING PROCESS

The learning function's strategic planning process complements Raytheon's annual business planning processes and timeline to ensure total and current understanding of the company's strategic drivers and people implications. Key markers of Raytheon's annual planning cycle include:

IMPACT

The learning organization's overall impact on Raytheon has been noteworthy, not only in terms of governance and strategic alignment, but also in key areas such as developing world-class leadership programs and practices, leading organizational and culture change, and driving efficiency and measurement.

LEADERSHIP PROGRAMS AND PRACTICES

Raytheon has developed a robust leadership development framework, a tiered leadership competency model and successful capstone programs from early career to executive level, designed to prepare top talent to take on the next level of organizational responsibility. The company is committed to identifying and investing in leaders who can make a significant and lasting impact on the business and has created a "culture of leaders" who learn by making contributions to the business, tackling real organizational challenges, gaining valuable executive visibility experiences, and applying what they've learned. Raytheon practices the philosophy of "leaders developing leaders" wherein experienced leaders share knowledge and perspectives with newer generations. Raytheon also rotates leaders across the businesses and functions, dedicates resources to develop deep reach talent, and utilizes a Leader of the Future profile, which examines desired experiences, behaviors and competencies. In 2009, Raytheon was named one of the Top 25 Companies for Leaders in North America by Hewitt Associates, the RBL Group, and Fortune magazine.

ORGANIZATIONAL AND CULTURE CHANGE

Last year Raytheon introduced a new Change Leadership methodology that was supported by the learning organization. The methodology provides an integrated change perspective, common language and tools, and a company-wide approach to driving successful change at all levels. The change leadership framework features six process steps and three overarching themes. There are a number of resources available to Raytheon leaders to support the methodology and framework, including learning courses, an informational website, a change toolkit, a Change Community of Practice, a competency model, and a pool of trainers and change practitioners. The Change Leadership methodology has been integrated into existing curricula and processes, including Raytheon's Six Sigma and leadership development efforts. Raytheon also unveiled a successful branding campaign designed to raise awareness of learning, foster collaboration between employees and managers, and align to performance development. Raytheon leverages its annual Employee Opinion Survey to measure cultural impact.

EFFICIENCY AND MEASUREMENT

In recent years, the learning organization has improved the identification, approval and communication of required learning in order to increase completion, support compliance and improve awareness, aligned to the Annual Operating Plan. Existing required learning and new requests were evaluated against a standard definition and criteria. The new governance eliminated the possibility of unbudgeted "pop-ups" and removed one such pop-up from the list. Eliminating one unbudgeted pop-up is estimated to have achieved a productivity savings of \$10 million. Raytheon has also developed robust measurement and evaluation governance, guidelines, and tools for evaluating impact. This initiative has resulted in a standard Level 1 evaluation as well as standard guidelines for Levels 2-5. A learning scorecard has been developed to measure key learning programs through Level 5. The objective is to gain even further insight and be able to use data to determine ROI and make strategic investment decisions.

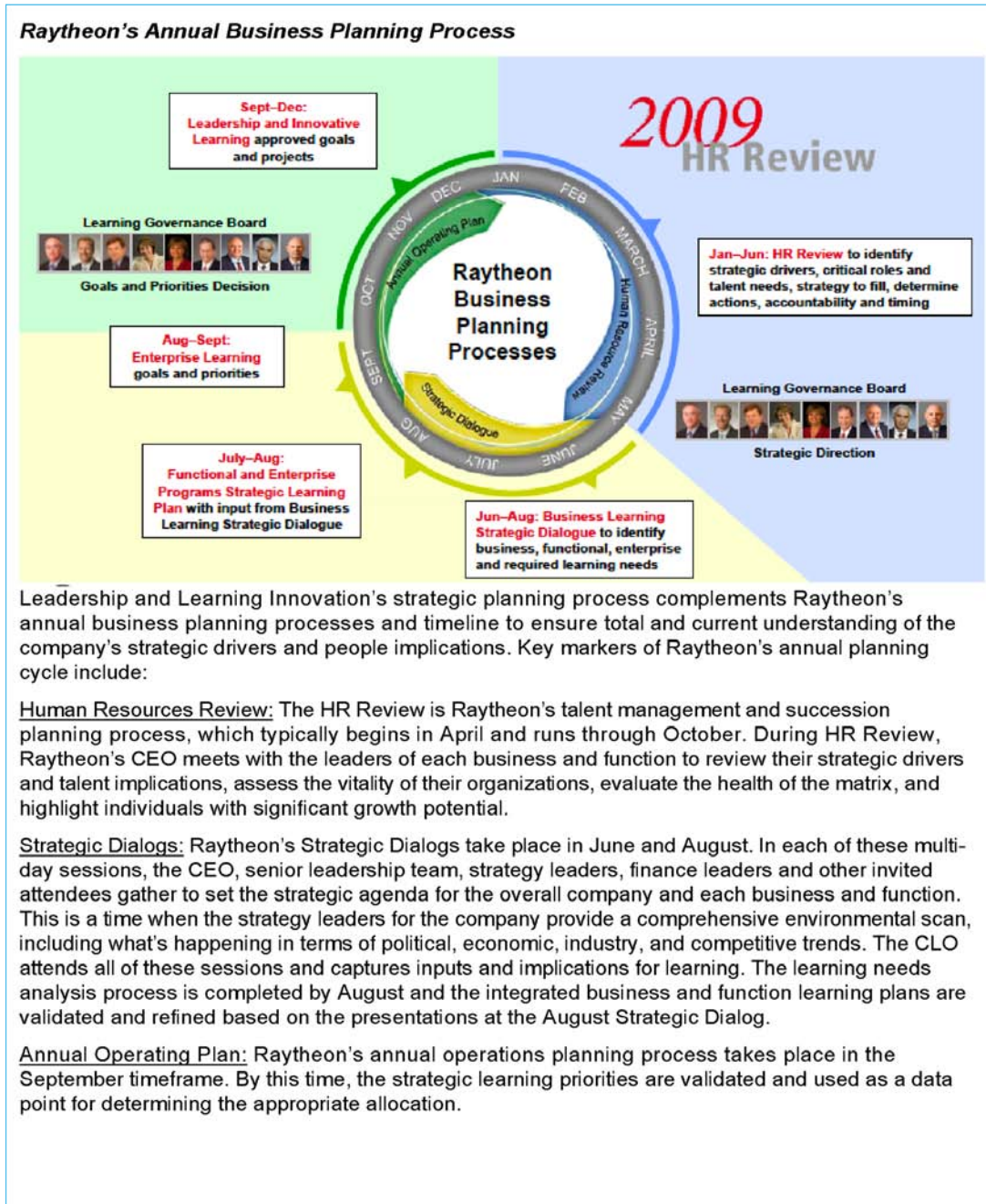


Figure 2. Leadership and Innovative Learning is involved at all stages of Raytheon's annual strategic planning process

Looking forward, the learning organization will focus on integrating learning and talent management, driving a culture of accountability, offering a spectrum of differentiated learning and development opportunities based on performance and potential, applying 'lean learning' principles, using metrics to demonstrate ROI and business impact, driving innovation and risk taking, supporting organizational change, and facilitating knowledge sharing.

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Appendix C. Case Study:

CREATING STRATEGIC VALUE THROUGH A FOCUSED MEASUREMENT STRATEGY



Appendix C. Case Study: Creating Strategic Value through a Focused Measurement Strategy

CHALLENGE

A global workforce solutions organization had, for years, been in the enviable position of having full leadership support – even without any metrics beyond Kirkpatrick Level 1 reports. However, the new CLO knew that the learning organization needed to be proactive in educating the company leaders in higher level metrics and demonstrating the value of Global Learning rather than risk having funding pulled during a challenging economy.

SOLUTION

Not only did the CLO initiate the creation of a new and improved measurement process in order to capture the impact that Global Learning was having on the business, but she and her team also developed an entire instructional design process that involved stakeholders, performance consulting, strategic alignment, and a strict measurement criteria for prioritizing learning initiatives that required that the programs project either causal impact or correlational impact on business results.

RESULTS

In just three years, Global Learning turned the perception that the company and its leadership had of the learning organization around from a nice-to-have extra function to a critical component of business success. This occurred because Global Learning has been able to tie significant business results, such as decreased turnover, increase in gross profit, increased recruiting productivity, and faster speed to competency among new hires either directly or indirectly to learning events.

CASE STUDY: CREATING STRATEGIC VALUE THROUGH A FOCUSED MEASUREMENT STRATEGY

The global workforce solutions company is a world leader in staffing and human resources solutions headquartered in Michigan. Founded in 1946, the global workforce solutions company has grown to over 6,500 full-time employees and 650,000 temporary employees around the globe, and revenue in 2009 was \$4.3 billion. Being a global company, the company has established a Global Learning organization to manage its needs.

The Global Learning organization consists of three key functions supporting full-time and temporary employees: pre-employment testing, onboarding and training. The Global Learning team develops and delivers global learning programs, as well as assists 39 countries with country-specific learning initiatives. The Global Learning mission is to grow the business by improving the performance of the global workforce through effective learning solutions. It is critical for the team to establish solid metrics to demonstrate achievement of this mission and the strategic value of Global Learning.

THE CHALLENGE

The global workforce solutions organization had a history of effectively utilizing Kirkpatrick Level 1 surveys to improve the learning experience and facilitator skills. However, they relied on learner reaction as the primary measure of success and the only tool for driving continuous improvement. A new Chief Learning Officer (CLO) came into the role in 2007. The CLO firmly believed that everything can be measured and began working with the team to incorporate more measurement into all of the existing learning programs.

The Global Learning organization was in the enviable position of having full support, and formal measurement wasn't typically needed to obtain funding or imply program success. However, the Global Learning team wanted to proactively educate company leaders as to the bottom-line impact learning programs could have so that the strategic value of the learning organization could be clearly demonstrated, even during a tough economic downturn.

Although the focus on greater measurement began with the leadership changes in 2007, the first major opportunity to demonstrate the impact of bottom-line metrics came in 2008 with the launch of the formal onboarding program. The Global Learning team didn't want to risk having the program not funded during pilot or official launch – especially given the uncertain economy – so they knew that metrics had to be identified up front to ensure alignment with the business and create operational impact. Their efforts took the measurement of results to a whole new level at the global workforce solutions company, and launched a dramatic change in how learning would be measured moving forward.

THE SOLUTION

The new CLO and the Global Learning team worked diligently for several months to develop an entirely new measurement strategy to capture the impact of their organization's efforts. While designing their specific methods, they focused on Kirkpatrick Level 3 (behavior/application) and Level 4 (results/business impact) in order to ensure that they were capturing evidence of transfer of learning and impact on business metrics. Knowing that companies have wrestled with this for years, they opted to apply an extremely focused framework based on traditional educational and scientific research methodology.

The revised Global Learning measurement strategy is based upon two specific metrics: *direct impact* and *correlation*:

- 1. Direct Impact:** With this approach, Global Learning seeks to prove a causal relationship between learning and its outcomes.
- 2. Correlation:** In these situations, Global Learning doesn't take full credit for producing the performance results; they simply demonstrate that there are relationships between learning and results. (With this approach, Global Learning cannot prove a causal relationship because there are other independent variables influencing performance metrics and bottom-line results that confound the connection between learning and outcomes.)

All learning initiatives now utilize these metrics as a litmus test for how a learning event is designed up front. Thinking with the end in mind during a needs analysis process, the Global Learning team projects the behavioral and business outcomes desired and required, and then determines, by analyzing other factors that may influence the outcomes, whether the learning event will be able to directly impact or correlate with those outcomes, and prioritizes learning accordingly.

OUTCOME-BASED PRIORITIZATION

Global Learning uses a standard instructional design process to design and develop each learning solution (Figure 1). The process requires each request for training have an executive sponsor at a Vice-President level or higher, or else the request does not proceed with the first step, Needs Analysis. Global Learning facilitates the Needs Analysis process to determine the viability of the request and if the objective(s) can be accomplished through some other method of performance support. If training is confirmed as the appropriate solution, then prioritization occurs based upon a number of factors, including alignment with strategic objectives, anticipated outcome/ROI, and the size of the audience.

During the next step in development – Project Agreement – Global Learning collaborates with the executive sponsor on what measures will be used post-training to confirm the outcome and ROI. If the executive sponsor is unable to determine measurable outcomes, Global Learning provides examples of previous ROI approaches to trigger thoughts. If a measurable outcome – either causality or correlation – cannot be determined, the team reconsiders whether training is the right solution.

For training that meets the outcomes-based prioritization criteria, program design and development moves forward. In order to maximize success, sponsors, advisory boards and subject matter experts are engaged to ensure the solution delivers upon the predefined learning objectives and anticipated outcomes for employees, managers and leaders.

ANALYZE	<p>Step 1:</p> <ul style="list-style-type: none"> Identify a SME, Sponsor, and an Advisory Board (SME's, stakeholders, field experts, those with a vested interest) Reach out to Regional /Country Training Managers) to determine their desired level of involvement Conduct Needs Analysis and own research 	Director/Manager
DESIGN	<p>Step 2:</p> <ul style="list-style-type: none"> Write Objectives Complete Course Outline Complete Project Agreement and gain SME approval (include Objectives & Outline in Project Agreement) 	Manager/Trainer
	<p>Step 3:</p> <ul style="list-style-type: none"> Design the Storyboard Gain SME and Advisory Board Approval 	Trainer
DEVELOP	<p>Step 4:</p> <ul style="list-style-type: none"> Develop Facilitator's Guide and materials Gain SME approval 	Trainer
	<p>Step 4:</p> <ul style="list-style-type: none"> Develop Participant Guide Gain SME approval Practice and familiarize yourself with material for launch 	Trainer
LAUNCH	<ul style="list-style-type: none"> Conduct Training Session with Advisory Board and SME Launch Course (see checklist for launching a course) 	
EVALUATE / MEASURE	<p>Step 5:</p> <ul style="list-style-type: none"> Review Feedback Report with SME and/or Advisory Board Review results with executive sponsor Gather metrics to confirm ROI 	Trainer

Figure 1. The Global Learning organization uses this instructional design process to design and develop each learning solution.

MEASUREMENT TOOLS AND SYSTEMS

In order to measure results, performance and financial data is gathered from a variety of internal sources at the global workforce solutions company, including Human Resource Information Systems, financial reporting systems, sales tracking tools, and front office systems. Learning data is then collected from the global learning management system and combined with performance and financial data to calculate direct impact and correlation measures.

Measurement results are reported through the following standard methods:

- **Global Learning Storyboard** – The Global Learning department has standard quality measures, such as Level 1 survey results and internal customer satisfaction, which must be met monthly. These results are posted monthly to the storyboard and any metrics not met require a formal root cause analysis.
- **Global Learning Dashboard** – The Global Learning team produces a monthly dashboard of status updates on key initiatives, as well as monthly and year-to-date metrics. This dashboard is distributed throughout the organization, including to the COO and the four operational EVPs.
- **Executive Sponsor Reviews** – Thirty days following the launch of each new learning program, established measures are reviewed with the learning program executive sponsor. During this review, trends in data are identified and recommendations for continuous improvement are discussed based on those trends.

MEASUREMENT CATEGORIES

With the shift in measurement approach and strategy, the Global Learning team has evolved from just one measure,

Level 1 survey results, to two direct impact and five correlation categories of measures:

Direct Impact Measures

- Workshop Activity Results – bottom-line impact of real tasks completed as part of a training workshop (i.e. orders created and filled from skill alert calls made during a Skill Alert training workshop)
- New Sales – new sales revenue directly attributed to a particular sales training program

Correlation Measures

- Level 1 Survey Results – learner reactions to content, course design and facilitation
- Usage Results – number of course registrations, completions and no-shows
- Completion Rates – timely completion of required courses and curricula
- Productivity – standard performance measures, including:
 - Average Sales
 - Recruiter Fills
 - Recruiter Ratios
- Turnover – percentage of employees voluntarily leaving the organization

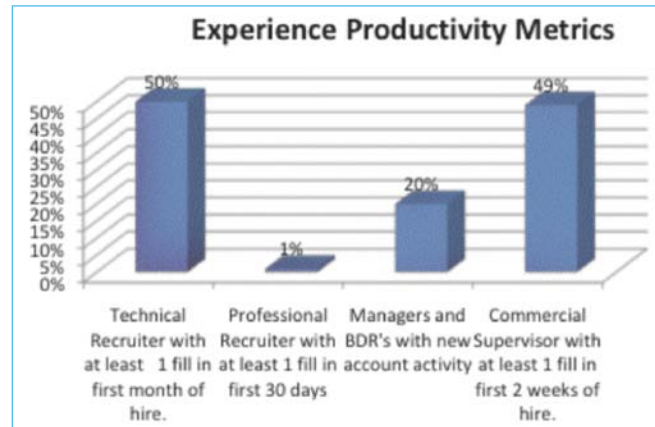


Figure 2. The number of new hires that have documented fill or sales activity in a one month time frame within hire date.

THE RESULTS

The Global Learning team is very proud of the direct impact and correlations associated with learning programs. In a relatively short period of time, they have gathered many examples of learning programs that have changed the culture, built skills and improved bottom-line company results. Here are just a few:

THE GLOBAL WORKFORCE SOLUTIONS COMPANY EXPERIENCE

The global workforce solutions company believes that new employees who have a consistent, welcoming experience into their workplace have greater productivity, higher levels of customer service and stay longer. Consequently, all new hires participate in The Global Workforce Solutions Company Experience onboarding program (a total of six hours) during their first week so they can experience the company culture, learn of the strategic priorities and determine the role they play in service excellence. In 2008, this program resulted in an 85% reduction in employee turnover, as compared to a control group during the six-month pilot, resulting in \$930,000 in turnover cost savings. New employees were also more productive two months earlier than the control group (Figure 2).

GLOBAL SOLUTIONS TRAINING (GST)

Targeted at senior sales executives, this program was designed to enable sales people to recognize and facilitate cross-selling opportunities. The curriculum is comprised of 11 solution courses and includes scenario-based role-plays and a high level of interactivity. The average sales of employees completing at least one of the GST courses is \$2.7M, compared to \$433K for those who have not participated in the program.

RECRUITER UNIVERSITY

Recruiters who have attended this skills-based classroom workshop averaged 16 percentage points higher for Interview:Start ratios (a standard recruiting productivity measure) than non-participating peers. In addition, live cold calling activities with side-by-side trainer coaching resulted in an average of 73 new job orders and 163 new candidate interviews.

Consultative Selling Skills

Through quarterly conference calls with participants from this classroom workshop, significant revenue has been attributed directly to the skills learned in it. The most recent conference call participants attributed the following results to the workshop:

- \$5,250,000 in new business
- \$1,500,000 in growth from existing customers
- \$250,000 in prospective business

In addition to the bottom-line measures that show Global Learning's quantitative impact on the organization, the team has also seen additional, encouraging trends over the past two years, which indicate a qualitative impact, as well. One is an increase in learning requests from the business. Also, Global Learning is being brought into projects and initiatives earlier in the process than before. Finally, there has been an increase in requests to participate in solution design for non-learning initiatives. All three of these trends indicate an enhanced perception of the Global Learning organization.

Multiple factors have dramatically influenced the role of learning at the global workforce solutions company over the past three years, resulting in the Global Learning team now being viewed as a strategic partner to the business. The first and foremost is that Global Learning has been able to correlate learning results to bottom-line operational results. The following are a few specific examples:

- In 2008, the onboarding pilot decreased turnover by 85%, which equated to turnover cost savings of \$930,000 during that period (Figure 3).
- The global workforce solutions company believes that engaged employees deliver exceptional service, which improves financials, and they have proven it. The company has statistically shown that GP% increases 14 basis points for every 1% increase in the Customer Net Promoter Score. As a result, Global Learning is creating 12 new courses and updating 35 courses to improve customer/candidate experiences.

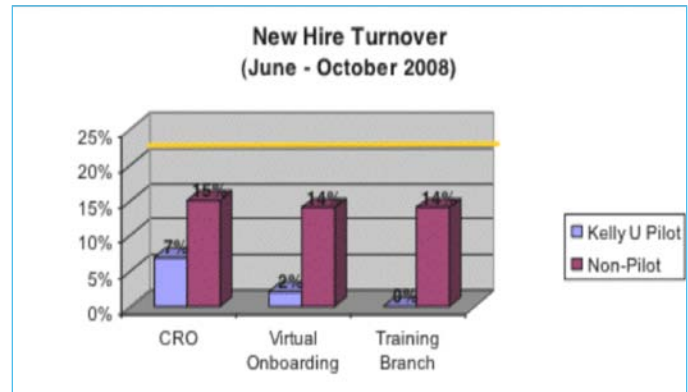


Figure 3. Pilot/Non-Pilot comparison of new hire turnover in 2008

- Results of the 2008 Recruiter Workshop series were correlated to Interview:Start ratios (standard recruiting productivity measure), which showed the ratio for participants averaged 16 percentage points higher than non-participant peers.
- Global Solutions Training (GST) launched February 2009 to enable sales people to cross-sell solutions. The average sales of employee completing at least one GST course is \$2.7MM, compared to \$433k for those not completing any (Figure 5).



Figure 5. Significant increase of average sales with attendance at Global Solutions Training

Another win for Global Learning has been that the CLO has proactively reduced the Global Learning budget annually for three years running while improving the value of learning through better utilization of resources, improved learner engagement and a business-driven strategy. Here are a few examples of this achievement:

- Class size for Virtual Instructor Led (vILT) courses has been reduced from 25 to 12 to allow for greater interactivity and the format has changed from “information downloads” to scenario-based interactive sessions.
- Learning solutions are now prioritized and built based upon business needs and solid learning objectives.
- The training delivery to new course development ratio has shifted from 95/5 to 60/40.
- Estimating guidelines by delivery method have been established to allow for productivity planning.

Today’s group of executive leaders at the global workforce solutions company have come to value the role of learning and understand the impact on employee engagement, productivity and bottom-line performance. This perception was tested and proven in the recent economic downturn. During the initial stages of downturn, classroom training was funded while other departments were cut because training was viewed by leadership as critical to overall company success.

The Global Learning organization today is a far cry from the Global Learning organization from four years ago. If the economic downturn had occurred while they were only measuring participant reactions, one can guess that the budget cuts would have hit Global Learning hard – quite likely at a greater rate than other functions. However, with a solid, outcomes-based design and measurement strategy in place, they now serve a strategic role in the global workforce solutions company success, and can no longer be dismissed as a “nice-to-have” department.

About NIIT's Enterprise Learning Solutions Business

NIIT's Enterprise Learning Solutions Business delivers innovative strategies that help clients accelerate business impact. NIIT Managed Training Services are a suite of best-in-class training processes that enable customers to reduce costs, sharpen their business focus, and drive quantifiable results. Our Managed Training Services deliver more relevant training to organizations, bring proven best practices into business processes, and redirect surplus training capital into core business functions.

Known worldwide as a leader in learning outsourcing, with presence in more than 44 countries, NIIT's Enterprise Learning Solutions business offers products and services, including curriculum design and custom content development, learning administration and operations, learning delivery and management, learning technology development and administration, learning management systems, virtual labs, student retention services, and strategic assessments. Together with its organizations, Cognitive Arts and Element K, NIIT's global talent development programs help clients achieve real-world skills to better compete in today's market.

Established in 1981, NIIT is known globally as the number-one choice for strategic learning solutions. NIIT has earned more than 53 awards, including 13 Brandon Hall awards. For more information about NIIT's Enterprise Learning Solutions Business, please visit niit.com, facebook.com/niitels, or subscribe to the Perspectives on Business Impact Blog. You may also contact Kimberley Kelly, Director of Marketing, at Kimberley.Kelly@niit.com

Corporate University Xchange

Corporate University Xchange (CorpU) is the leading provider of corporate university research, benchmarking, and advisory services for helping organizations transform corporate learning. Founded in 1997, the aim of CorpU research and services is to maximize corporate investments in training and development to deliver improved business results. The company's benchmarking studies and annual awards programs set the standards for the learning industry. Our knowledge and practical experience providing solutions across multiple industries enables us to transform organizational learning operations with extreme efficiency. While there is no standard learning plan that every organization can adopt, there are solid methods available for building effective and comprehensive strategies by interviewing key leaders, conducting assessments, and using strategy mapping and planning tools to design a future state and detailed transition map. CorpU is the leading provider of these services, along with research-backed expertise to optimize, improve upon, and add to learning and development programs to achieve successful business outcomes. All of our services are supported by ongoing, independent research of trends in corporate learning and identifying best practices that drive business performance improvement. Inherent in all work we perform is a deep understanding for how the best programs operate.



NIIT

1050 Crown Pointe Parkway, 5th Floor

Atlanta, GA 30338

www.niit.com

businessimpact@niit.com

Phone 770-290-6000

Fax 770-551-9292

