



David Vance

President

Caterpillar University



Launching a Corporate University: The Caterpillar Experience in Addressing Governance, Structure, Strategic Needs Alignment Metrics & Evaluation

Dave will share the Caterpillar University journey over the past five years highlighting their approach to governance, structure, strategic needs alignment, metrics and evaluation.

The challenge facing Caterpillar is similar to that facing many organizations today. Increasing numbers of baby boomers are retiring taking critical knowledge and experience with them. At the same time, the company is expanding into new geographies and product lines which require skilled leaders and employees. Moreover, the competitive environment continues to get tougher, demanding greater efficiency, more innovation and ongoing cost cutting.

Caterpillar University was created in 2001 to meet these challenges, leveraging global learning in the most efficient and effective way possible. Initial focus was on identifying and meeting common, global learning needs like leadership, performance management and 6 Sigma. Cat U develops these programs and then shares them with the 28 semi- autonomous business units around the world. Employing a hybrid model, Cat U has centralized learning strategy and design in a decentralized business unit structure. The majority of learning professionals resides in the business units but have a "dual solid line" to Cat U to ensure alignment and consistency.

Learning needs are identified through a strategic process starting with enterprise strategy and cascading down to individual divisions or business units. The Lead Learning Manager in each of the 28 business units is responsible for creating a Division Learning Plan (DLP) which identifies the strategic and tactical learning required to meet the goals of the unit. Cat U then aggregates these DLPs into an Enterprise Learning Plan which includes the prioritized learning needs. The Caterpillar University Board of Governors approves the plan, including the enterprise and university learning budgets.

To ensure Cat U is delivering value and meeting the needs, an extensive metrics and evaluation has been implemented. Level 1 goals are set for all programs, Level 2 goals where appropriate and Level 5 ROI for key programs. Progress against plan is measured monthly. Each year several in-depth ROI studies are completed after pilot and after the program is in production. This not only ensures the program's delivery value, but allows the staff to more fully understand cost and benefit drivers so continuous improvements can be made.

While Cat U still has a long way to go to meet all the company's challenges, we have come a long way and learned a tremendous amount. The next five years will be even more exciting.



Don Vanthournout

CLO



Training for High Performance at Accenture.

Don is Accenture's Chief Learning Officer and the head of the company's Capability Development organization. In his current role, he is in charge of the capability development needs, including learning and knowledge management, of the company's more than 123,000 employees located in more than 48 countries.

To measure the value of its investment in training, Don will talk about how Accenture worked with statistics professors from the University of Chicago to conduct a return on investment (ROI) analysis. The analysis showed that training has measurable effects not only on employee performance, but also on recruitment, retention, chargeability and bill rates.

He will also talk about how this analysis helped Accenture change its entire approach to learning. Accenture's learning mission statement helps guide the company's work and mindset that reflects the heart of Accenture's business strategy. Our mission is to create a premier professional education program, building leaders and a differentiated workforce that enables the acceleration of Accenture's strategy.

Business Challenge

What does Accenture's sizable investment in training buy us?

Accenture Solution

Recruitment: Training allows Accenture to recruit better employees

- A study of newly hired employees showed that training is the number one reason they join Accenture (n = 2,342).
- An external research organization's study of potential Accenture recruits showed that people would take a job at Accenture for \$6,000 less than a competitor because of the perceived excellence of Accenture training programs (n = 525).

Employee Retention: Training helps Accenture keep employees (From Accenture's Employee Satisfaction Survey, n = 31,229) Employees who say they have access to the training they need to be successful are:

- 2.2 times more likely to expect to be with Accenture in two years.
- 6.7 times more likely to think Accenture is a great place to work.

Performance: Training improves employee performance (From Course Evaluations, n = 282,000 of 3,750 courses)

- 76 percent of employees said the course was applicable to their work.
- 86 percent of employees said they had at least a moderate increase in knowledge or skills as a result of the course.

Return on Investment: Training adds to the bottom line

Accenture performed an in-depth statistical analysis of detailed records on the 261,000 people who have ever worked for the company. These records include information such as cost rates, bill rates, total time with the organization, and promotion date. Accenture factored out the effects of personnel level, experience, inflation, and business cycles.

The analysis showed that employees who take more training (top 50% relative to bottom 50%):

- Are 17 percent more chargeable.
- Have 20 percent higher bill rates (due to promotions).
- Stay with the company 14 percent longer.

Results – Return on Investment

These benefits of increased chargeability, bill rates, and retention combined to yield an impressive net return on the investment of training of 3.53. For every dollar Accenture invested in training, there is a return of \$3.53 in net benefits, after costs are recovered.

As a result of our study, Accenture found that:

- Average of 80 hours of learning per employee a year.
- Learning is viewed as an investment, not a cost.
- Building leaders at all levels is a critical component to the training strategy.
- ROI study offered evidence that learning impacts corporate results.

Learning at Accenture runs like a business, and is essential to maintaining corporate culture



Terri Calvert
 Manager Learning
 Content and Delivery
 Anixter Inc



Kevin Himmel
 Director of Performance
 Consulting
 Regis Learning Solutions



**Accelerating Performance by Fusing
 Sales and Technical Training**
*A Simulation Case Study:
 Anixter International, Inc.*

Learning Solutions

What does it take to elevate performance? How can you get people to become competent more quickly when you sell thousands of technical products from over 3,500 suppliers?

Anixter is the world’s leading distributor of communications products used to connect voice, video, data and security systems. The international company needed a way to elevate the performance of their new sales employees quickly.

It took a creative approach. Anixter’s business is very dynamic and sales reps need to handle a high volume of technically oriented daily transactions and interactions. There is a tremendous amount to learn while the phone is constantly ringing.

How did they do it? A new sales employee class combined a “Total Value Selling” approach with product, technical, and supply chain services knowledge in a challenging competitive sales simulation to produce more knowledgeable and confident salespeople in just 4.5 days.

During the summer of 2004 the Anixter Learning Group partnered with Regis Learning Solutions (RLS) to incorporate the RLS BRIDGE™ solution selling simulation into the Anixter RapidStart program for new sales employees.

The BRIDGE™ solution selling process provided the selling skills framework, “story line,” and skill practice woven through technical, product, and services training that made the class compelling and highly realistic.

The BRIDGE simulation provided a team-based approach with multiple customer calls that culminated with a final sales presentation integrating products, services, and selling skills on the last day of class. At the end of the simulation, new employees had learned and used a tremendous amount of information. They also took away rich experiences that prepared them to handle complex selling situations back on the job.

Since beginning the program in early 2005, reviews from participants and sales managers have been very positive. The data being compiled on new sales employees’ performance shows strong sales performance across all Anixter product lines.

There are numerous lessons that have been learned during the implementation of this program. A theme that continues to be discussed is that “standard” technical and sales training would not have been enough to engage and increase new sales representative’s performance – the BRIDGE™ solution selling simulation provided the environment to experience how to use, think, and apply sales and technical knowledge in a real-time sales environment. Above all else, this helped prepare the new sales representatives to sell with greater knowledge, confidence, and effectiveness on-the-job.

For more information, please visit <http://Chicagoland.ExecutiveLearningExchange.com/> or email LearningExchange@sbcglobal.net

Selective Training Outsourcing



Tim Aleck
Training and e-Learning
Director



Adam zamora
Manager of Professional
Services



Strategic Challenge:

Short-term Challenge - Comply with an FDA commitment to train 1,382 employees on FDA-required courses in less than 4 weeks. And with minimal initial investment, build a case for a centralized e-Learning platform by working with individual business units to determine their needs and garner their support.

Long-term Challenge - Continue centralization by migrating off remaining redundant systems, address compliance requirements and expand centralized e-Learning platform use by a broader global audience.

Learning Solution(s):

Baxter selected Trifus as its e-Learning provider in the fall of 2002. Completion rates for the FDA-required training were 99.86-100%. This deadline could not have been met using classroom training for this large group of people. In 2004, 8,359 employees used BaxterLearning.com to take courses to fulfill Safety and Quality course requirements, improve management skills using Harvard ManageMentor™, learn about Baxter products and therapies, and improve PC skills.

LMS: Trifus provides Baxter the Trifus Learning Solution (TLS) LMS as a hosted solution, based on a simple subscription license model.

Courseware: To train its nearly 50,000, Baxter selected quality online courseware from eight content providers in subject areas including environmental health and safety, leadership development, IT skills, quality, sales, marketing and life science. Trifus installs the courses, integrates the courses with their LMS, provides customer support and tests and deploys courseware updates from the content providers. The key for Baxter is that they get to take advantage of the best courseware from different providers.

Assessments: As a health care company, Baxter needs to do more than just track that an employee has completed a course by using Questionmark assessment authoring and publishing platform.

Lessons Learned:

- Centralize the dollars. To facilitate the use of standard tools pool resources
- Run it like a project. Involve customers for their functional requirements: upgrading functionality, expanding courseware, contracting with development vendors, licensing courseware development tools.
- With a large customer in the heavily regulated medical industry, Trifus had to learn to work with multiple business units to help achieve the overall goals.
- The importance of being able to work with multiple business partners to provide a complete and seamless solution.
- Regulatory mandates may require the vendor and customer to work very closely on short turn around projects. This taught Trifus how to organize into quick response teams to meet objectives.

Measuring Leadership Development Performance Impact

Karesa Prestage
Program Manager
The Boeing Company

Brad Brodigan
Partner
The Gallup Organization

Dean Davison
Manager, Global Accounts
DDI

Steve Junion
Senior Performance Consultant


Strategic Challenge:

Boeing was faced with developing a leading edge solution to aid in preparing high level individual contributors and mid level managers in preparation for future executive level positions.

Learning Solution(s):

The solution is focused on developing competencies for the Senior Executive level at the Boeing company. Participant selection begins through a formal interview process. Additional instruments allow the participant to understand their talents (e.g. how they are hard-wired) and how to leverage those talents in their career. A multi-rater assessment (360) provides the participant data on their effectiveness in critical leadership competencies. The participants are also taken through an intensive simulation experience which allows them to try on strategic roles faced by Senior Leaders. The solution culminates in a Strategic Leadership Challenge™ which allows for extensive skill and application of newly developed skills. This program also ties leadership effectiveness measures pre and post program. In addition, outputs of this experience will feed into a career management program for participants.

The solution is being lead by Boeing leveraging two top tier talent leadership firms – The Gallup Organization and Development Dimensions International for the design and leveraging Intrepid Learning Solutions as the program design lead.

Lessons Learned:

Integration with other Human Resources functions responsible for Succession Planning / Talent Management is critical in fully providing a successful pool of high potential participants.

The use of diverse partners and the resulting collaboration in the development of this program creates a more powerful leadership experience for participants. A byproduct of this process is that we are all growing our own leadership experience and knowledge. The end result is that new ideas and experiences are occurring as a result of this collaboration.

In order for the leadership program to be a success, it requires a high level of ongoing commitment from the participants and their sponsor. This program is designed to set the stage for a strong relationship between participant, facilitator and sponsor.

1 + 1 = 3



Edward A. Trolley

Vice President of outsourcing
KnowledgePlanet



Running Training Like A Business

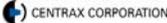
How does training close the gap between hard-edged business issues and training solutions that will make a measurable impact? The answer can be found in an approach called “Running Training Like A Business”. This approach ensures that your training can and will deliver clear business value to your organization. In this session, author Edward Trolley will make the business case and then share with you a five-step process for transforming traditional training organizations into training enterprises capable of delivering unmistakable value. In this session, you will learn:

- How to make T&D a full strategic partner in business decision-making
- How running training like a business helps the organization realize the strategic value of training
- How to transform your current training capability into a well run “training business”.



Eddie Garmon
 Director,
 Total Water Management




**David Scurlock
 & Ed Prentice**
 Centrax


Sales Training for "Non-traditional" Sales Force

Training service personnel sales skills to increase customer satisfaction and revenues through selling additional products and services

Strategic Challenge

The business challenge that needed to be address was a way to train/educate the service staff of a dealer network. The training had to be focused, short modules that could be used in a blended format or in a self-paced environment.

The product manufacturer and service provider (Everpure) needed to provide this tool to its distributors so the distributors could train their dealer's service personnel.

Learning Solutions

The training consisted of some fundamental sales communication concepts and skills that the service technicians could incorporate during their customer visits. Centrax developed an engaging 3D character simulation based program that allows the student interact with virtual customer environments. The program allows for interaction with the customer and also recognition of equipment that would be potential sales opportunities.

Lessons Learned

The business benefit/payoff and return on investment was manifested in a number of ways:

1. Better experience for the customers as a result of technicians enhanced skills and awareness.
2. Increased opportunity for additional sales for the distributors and their dealers.
3. Increased product awareness and sales of Everpure products to the distributors.
4. This training program was part of an overall marketing, support and recognition program that Everpure provided to its distributors.



Tina Thompson
Global Learning &
Development Manager



Lisa Tucker
Account Manager



“Talent Management: Installing Your A Team”

Strategic Challenge

Early this year, Tina Thompson accepted the position of Global Learning and Development Manager for Panduit, a leading manufacturer of high-quality products for wiring and communications. Her role was to develop the strategy for a corporate university and hire an entire team of learning and development professionals. Two weeks into her new position, she discovered she also had the awesome responsibility of implementing customized learning for the end-users of the company’s new, enterprise manufacturing system, which was to go live in just 10 weeks.

The challenge was daunting – where can you find a pool of qualified resources, and in such a short timeframe? The problem is that everyone is looking for the “A” list of learning and development professionals. I think this list is very short. Who’s on the list? Who owns the list? Is someone hiding the list? Is there even really a list? Can I buy it? Steal it? Sell it once I have it? How do you find these resources?

Learning Solutions

Tapping your professional network to find the solutions you’re looking for. But first, learn what networking is all about and how to exercise methods to contribute to your network, as much (or more), as you receive. Seasoned networkers learn through experience that networking is:

- Not just about you, or about what you can get; it’s also a commitment to what you can give back.
- Not just an event, but an everyday opportunity to interact with “A” players.
- A commitment to learn and grow through the people that you know.
- Paying it forward.
- A connection on the roadmap to your desired outcome.

Lessons Learned

Tina learned several valuable lessons.

- “A” players ARE out there, but they’re not necessarily actively looking for jobs.
- “A” players will not fall in your lap.
- Include “A” players in your network, “A” players attract other “A” players!
- Take action beyond the search engines and job boards.
- Be on your game at all times! Every day is an interview. And yes, your appearance counts!
- The “A” list of Chicagoland learning professionals will always encounter one another again, and again, and again.
- Apply the Kevin Bacon rule.
- Find and cultivate a good partnership for non-core needs.
- When you offer help, it comes back again and again!
- Reap what you sow.



Wendy Farrell
e-Learning Consultant
LionBRIDGE Technologies


Kim Hagen
Director of e-Learning


**Global e-Learning –
Delivering Multilingual
e-Learning Programs**

Strategic Challenge

Because of increasing globalization, many companies must now release multilingual corporate eLearning. But most corporations are still using a serial approach to global eLearning, where there is very little coordination between creation and translation of eLearning content. Under this model, content is often developed without regard to international audiences. At times, the teams charged with developing the English content do not understand the adaptations required for localization. In addition, this type of serial process can be cost prohibitive and slow.

Under this model, content is often developed without regard to international audiences. Learners are accustomed to different educational styles and dialects. In the US, learners expect to get to the point quickly, where as Asians require learning theory before facts and Europeans expect a structured learning environment. Just as learning styles vary, dialects also present challenges as Spanish for Mexico differs from Spanish for Spain. For companies to realize the ROI on e-learning initiatives, understanding these differences is a unique challenge. In addition, this type of serial process can be cost prohibitive and slow.

Learning Solutions

At Lionbridge, we have developed a methodology, called Globalization-at-Source(SM), which integrates the content development and localization processes. With Globalization-at-Source, eLearning content is localization-ready in structure and design. The benefits of Globalization-at-Source to our clients have been the following:

- Compressed eLearning release cycles
- Preservation of instructional intent across multiple regions
- Reduced costs for multilingual eLearning creation
- Lower costs for end-user support

Lessons Learned

During the presentation we will share some real world examples of how the Globalization-at-Source methodology has improved global eLearning for our clients and some of the lessons we have learned during that process.

Kim Hagan, Director at Aon University will share her experience in delivering a Code of Conduct course to Aon countries across the world. The following topics will be discussed:

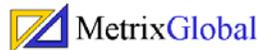
- Translation...the easy part of the project?
- LMS or no LMS...that is the question.
- Data Privacy Issues in Europe – “You can’t see my data”.
- Issues you didn’t consider “Oh by the way...the French don’t have internet access”.
- Communicating with the rest of the world or “How not to be an ugly American”.

We would like this session to also be a discussion of YOUR experiences with a global course deployment, so be ready to share your experiences and best practices.



Merrill C. Anderson, Ph.D

CEO & Co-Author of *Coaching That Counts*
MetrixGlobal



Leading with Insight: What ROI studies tell us about leadership coaching

Learning Solutions

In our book *Coaching that Counts* we share the insights gained from ROI studies we conducted on coaching and leadership development. Coaching has proven itself to be a powerful way of developing leadership talent. We will begin this interactive session by sharing a case study illustrating how a company gained a 700% ROI from a coaching initiative. Then, we will explore how value of this magnitude can be created. The developmental model *Leading with Insight*[™] will provide a backdrop to discuss the major findings from our ROI studies:

- As leaders transform themselves, they create strategic value for the business
- The interplay of insights and actions drive transformational change
- A shift is made from leaders being *coached* to leaders being *coaches*



Sheri Jeavons
President
Power Presentations
POWER PRESENTATIONS INC
Communication Skills for the Professional on the Move

Powerful Presentation Skills to Get Results:
Communicate Successfully to Upper Management

Learning Solutions

Energize your presentations by learning key physical skills needed to be a dynamic presenter in this interactive, informative, educational and fun format. Learn to stand and deliver with a commanding presence to get the approval you need from upper management. Segments will involve two volunteers who will receive one-on-one coaching to look and sound powerful when standing and presenting to a group. The audience will see how easily and quickly they can change and enhance their presentation style by fine-tuning one or two physical skill elements. This is a positive experience for the volunteers and fun for the audience.

Lessons Learned

Discover key physical skills needed to be a dynamic presenter. Learn to communicate effectively, persuasively and enthusiastically to upper management. Polish presentation delivery techniques to look relaxed and natural, connect with your audience, know what to do with your hands and project your voice with enthusiasm. You will be able to immediately apply these new skills to engage and excite your audience.



Kenneth Hall
Director, Learning & Dev.
Pfizer Consumer Healthcare



Anna Belyaev
CEO
Type A Learning Agency



Innovation:
more than an exercise in creativity

Strategic Challenge

The strategic challenge that we undertook as partners on this assignment was to engage Pfizer Consumer Healthcare colleagues around the world to build innovation into their work. That challenge required a solution as capable of driving behavior and culture change as of driving knowledge transfer.

Secondary tactical challenges included the need to accomplish these aims without using any rich media whatsoever, so as to accommodate the wide range of technology platforms and networks used by Pfizer colleagues around the world.

Learning Solutions

The blended learning solution we employed to achieve our aims on this assignment leverages existing Pfizer innovation methodology and action learning approaches coupled with Type A's innovative e-Learning Campaign format, style assessments, learning circles, and popular Hit the Floor! exercises to drive conversations, behaviors, and stakeholder involvement crucial to innovation at every level of the organization.

Lessons Learned

Be explicit in setting your business objectives. Don't wait for perfect or total stakeholder alignment € Trust your gut and move € Lead by encouraging others to do the same. Exercise rock-solid project management.



Neil Witmer, PhD.
CEO
WITMER & ASSOCIATES
TALENT • LEADERSHIP • EXECUTION



Tony Bowker,
CFO,
Goose Island Beer
Company.

Action-Learning for Senior Leaders Who Have Outgrown Seminars

Strategic Challenge

Senior managers are a unique breed, especially those who are seasoned or high potential. They tend to be impatient, intolerant of classrooms. Some attend business school programs if the peer group promises to be stimulating, but they secretly worry that the topics will be too theoretical and the process boring. Those who seek to develop the “people” side of leadership tend to come away from most programs unchallenged and unchanged. Emotional intelligence is taught as a concept, not as a skill. Many programs, e.g., CCL, are expensive and require travel. Those of us who have experimented with experiential and action-learning programs have discovered another challenge—that many senior managers who enroll in these programs have limited courage to try new behaviors, even behaviors that are proven to reflect great leadership. In other words, when asked to do something remarkable, some are more comfortable with follower-ship than leadership. This creates a problem for both the learner and the HR/L&D sponsor, i.e., both show up with egg on their faces when the program ROI is evaluated.

Learning Solutions

Since 1994 we have experimented with approaches to leadership development for mid- and upper management. We designed curricula from input from CEOs and the learners themselves. We identified sought-after skills, and used various blended approaches to teach them. These include feedback tools, supervisor input, psychometrics, role-plays, outdoor education, personal growth, video models, behavior recipes, back-home projects, on-the-job coaching and ROI analysis. Over time we have shifted away from “technique training” such as active listening, conflict management and performance review, which many learners found to be initially helpful but resulted in little skill retention. In a sense, we gave up on teaching old dogs new tricks. Instead, we shifted to an approach of enhancing a leader’s natural skills. With this approach, we first screen out managers who have little real interest in, or ability to, change. We then provide a 3-day retreat where we help them probe deeply into their natural skills, both healthy and dysfunctional. Rather than focus only on bad behavior, we help them understand that their natural style has both productive and unproductive consequences. We also help them rediscover passion for their job, after which leadership behavior tends to occur naturally. We coach them to then write an action-learning plan that is executed in cooperation with their supervisor, supported by a day of coaching on the job, sometimes involving their supervisor or their staff.

Lessons Learned

- Invest your leadership education budget only in people who naturally prefer leadership to follower-ship, and have a bias for action and risk-taking. Here is where you will see behavior change, and ROI. For others, teach leadership through simpler methods such as team building and 1-on-1 coaching.
- Don’t expect senior managers to change their behavior unless they really want to. It may take a significant emotional event, or a skilled coach, to “light them up” and rediscover, on an emotional level, more passion for behaving as a leader.
- Provide a structured, on-the-job action-learning project where they are held accountable by their supervisor to follow a written plan to create a result that both parties see as compelling.

**MARTY ROSENHECK, PH.D., CPT**VP Design and Development
Cedar Interactive

Designing a Case-Based Blended Curriculum

*A Case Study:
Social Security Administration*

Strategic Challenge

The Social Security Administration hires hundreds of Claims Reps and Customer Service Reps each year in over 1300 field offices. It currently takes 18 months or more to become proficient at these complex jobs. SSA needs to reduce the time it takes to develop new hires into excellent performers who can coordinate and apply systems, policy, workload management, and customer service knowledge to serve the public.

The challenge was to develop a model for training that

- Significantly reduces time to proficiency
- Increases motivation to learn
- Enables people to apply their learning to the job
- Reduces manager and mentor time reviewing and correcting work

Learning Solutions

To achieve these goals we employed a methodology we call Performance-Centered Learning which is based cognitive science research on the development of expertise to develop a blueprint for a case based curriculum. The model envisions a blended approach using online simulations, video on demand, self study text, on-line collaboration tools, mentoring, and structured OJT.

The key design principles are:

- Learning by Doing
- The Teachable Moment
- Scaffolding
- Simple to Complex
- Spiral
- Integrate Knowledge, Systems, Skills
- Community of Learners

This case study will illustrate how these case-based learning principles can accelerate the development of expert performance in a large organization, resulting in savings of millions of dollars.



Jeffrey Berk
VP, Product & Strategy
KnowledgeAdvisors



Veronica Schmeilski
CatU



Leveraging Learning Analytics Technology at Caterpillar University

Strategic Challenge

This presentation will focus on the strategic need for learning metrics at Caterpillar University and in general for any corporate university. The business case for metrics and relevant research supporting the business case will be discussed. At Caterpillar University a need for day-to-day metrics that could be accomplished with little financial, physical, and human resources was identified. The technology solution must integrate with the existing learning management system (LMS).

Learning Solutions

Caterpillar University deployed a practical, scaleable and repeatable technology known as Metrics that Matter. This is an ASP-based solution that wraps technology around industry-based methodology (Kirkpatrick, Phillips) by providing automated data collection, storage, processing and reporting on key metric results. The LMS sends Metrics that Matter nightly registration logs which then trigger evaluations to be sent. After processing the data, Metrics that Matter reports the data in a robust OLAP reporting engine and Cat U also receives monthly custom outputs on its Learning Quotient Index (LQI).

Lessons Learned

Key lessons that will be discussed are the need to plan the metrics before collecting them, which Cat U did and it has paid off. Also lessons learned will include the need to understand all the integration points thoroughly before integrating systems. Finally, managing change associated with measurement is important to ensure a successful rollout of measurement systems.



Karen Scott
Senior Manager



Chip Cleary
Vice President



Bringing Allstate's Good Hands®
Promise to the Next Level

The Challenge

The Good Hands® Promise helps bring customers to Allstate by emphasizing things that set Allstate apart from the competition:

1. Have competitive prices
2. Be easy to do business with
3. Offer products and services to help meet customer needs
4. Provide a knowledgeable and experienced team
5. Establish relationships that add value to customers

Allstate stresses the importance of employees understanding the Good Hands® Promise and identifying how it applies in their jobs by educating all employees on it; applying it to representatives interacting with external customers and employees supporting internal clients, how could Allstate make this education relevant for the varied audiences across its business units? The challenge was in determining what to include in the education and what not to. Finally, delivering education on corporate values and branding often comes across as corporate-speak. How could Allstate create education that would connect the Good Hands® Promise with employees' day-to-day decisions?

The Learning Solution

Allstate and CognitiveArts, a division of NIIT, partnered to create a short online course, delivering the Good Hands® Promise. This course, receiving positive feedback, confronted learners with challenging situations and coached them through making sound choices.

The method used to identify content for the course made a key contribution to the success of the effort. Early on, we decided we wanted learners to understand the Good Hands® Promise by having to apply it. We wanted them to confront difficult situations in which they might readily make suboptimal choices. To identify those situations, we used a modified form of needs assessment called Critical Mistake Analysis (CMA). In our talk, we will describe CMA and how we applied it. We will share how CMA enabled us to incorporate inputs from Subject Matter Experts without ending up with a course that was a "mile wide and an inch deep." We will also share how the CMA led directly into the development of the course scenarios themselves, ensuring the course was relevant to the learners.

Lessons Learned

- Early senior leader buy-in/sponsorship is critical
- Business partner input is invaluable in getting language that people connect with and that is representative of real-life dialogue
- Challenging scenarios promote respect/credibility and demonstrating both optimal/suboptimal outcomes provides opportunities for comparison for employees
- In providing alternatives for learners, ensure that navigation is intuitive
- Consider opportunities for repurposing content in early design decisions

For more information, please visit <http://Chicagoland.ExecutiveLearningExchange.com/> or email LearningExchange@sbcglobal.net