



## High Impact Continuous Learning @ GE Healthcare

### **Bob Cancalosi**

Chief Learning  
Officer



### **Strategic Opportunity:**

ASTD estimates that ~\$125B is spent annually on Learning & Development, yet multiple studies show that only 10-45% actually gets applied to the workplace. Our goal as learning leaders is to increase the yield on learning and enhance the linkage to positive and sustainable business results.

### **Learning Opportunity:**

Bob will share insights on:

- GE Healthcare's model to deliver consistent business results is called **"Halt It & Unlock It"**.
  - The **"Halt-It"** is about 6 ways of reducing learning scrap and
  - The **"Unlock-It"** it is a metaphor of 4 combination numbers that the best leaders naturally do to drive the greatest impact on learning.
- The details on "Halt-It" and "Unlock-It" will be revealed in detail during the opening keynote!

### **Lessons Learned:**

Bob will share his insight on impact on program delivery and continuous improvement efforts

**Set the Roadmap for Continuous Learning ...**  
*Delivering CONSISTENT Business Results*



**Dave Vance**

Executive Partner,  
Professor & Author



**Julie Anding**

Sr. Director



**Bob Cancalosi**

CLO



**Daryl Glimps**

Director



BMO  A part of BMO Financial Group



**Judy Braun**

VP, Global Talent  
Development

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The purpose of this engaging roundtable is to share how various companies' Learning & Talent Development groups are using today and planning for tomorrow innovative methods to support *Delivering CONSISTENT Business Results through Human Capital & Continuous Learning* in the upcoming decade.

**Discussion Points:**

To help guide the roundtable discussion, our panel members will share their insights on how L&D organizations deliver consistent business results. In particular, the panel will discuss the importance of

- 1) Clarity in vision and objectives,
- 2) Right team in place,
- 3) Alignment of learning to the organization's goals,
- 4) Business involvement,
- 5) Focusing on leaders,
- 6) The never ending quest for improvement,
- 7) Reducing scrap learning, and
- 8) Driving impact.

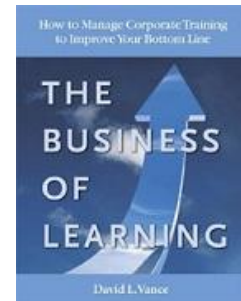
We plan on having the last 15 minutes for audience questions.



**Dave Vance**  
Executive Partner,  
Professor, Author & and  
former CLO @  
Caterpillar



## ***The Business of Learning: What It Takes to Deliver Results and How TDRp Can Help***



### **Strategic Challenge:**

Learning must be run like a business to ensure that it has the greatest impact on business results. This implies four steps.

- 1) Learning must be focused on the highest-priority goals of the organization.
- 2) Learning must be carefully planned to deliver results agreed upon in advance with the stakeholder, including the expected impact of the learning initiative on business goals. Ideally, this step includes the creation of a business plan for learning and development of a business case for the key programs.
- 3) Learning must be executed and reported with discipline to ensure the promised results are achieved.
- 4) Results must be measured and compared to expectations in order to continuously learn and improve.

### **Learning Solutions:**

**Talent Development Reporting Principles (TDRp)** are now available to make the process of running learning like a business much easier. TDRp provides standards and guidance for the L&D profession to plan learning initiatives, report progress using standard definitions, and demonstrate the value of learning. Put simply, it answers the questions of what data to collect, how to define the measures, and what to do with the measures. This grass roots effort was initiated by Kent Barnett (CEO, Knowledge Advisors) and Tamar Elkeles (VP of Learning and Organization Development, Qualcomm) in the fall of 2010 and has benefited from the guidance of industry thought leaders and leading practitioners. TDRp is now complete for L&D, including principles, definition of terms and measures, and three recommended statements and reports. The outcome statement collects the most important business goals and learning's expected impact on them, clearly showing the value of learning to the organization's success. The effectiveness and efficiency statements collect all the quality and cost/activity measures. Customized management reports pull the most important measures from the statements to use in actively managing the function to deliver the promised results. An L&D summary report is recommended for the CEO and senior leaders while program reports as well as an operations report are recommended for the CLO and senior L&D leaders.

More information about TDRp is available at [www.TDRprinciples.org](http://www.TDRprinciples.org).



**Angie Zeigler**

Director



## ***Continuing the Leadership Development Journey at Harley-Davidson Inc.***

### **Strategic Challenge:**

As we began to transform our company in 2009, we refocused our business strategy on four pillars that would begin to drive all business decisions. Those pillars are Growth, Continuous Improvement, Sustainability, and Leadership Development. As part of the Leadership Development pillar, we assessed the current state and recognized that we did not have robust leadership development programs in place that would prepare our leaders for the changes ahead. Developing leadership as a capability in our workforce had not been a priority in the business. We needed to close that gap.

### **Learning Solutions:**

Interviews with our executives drove the development of an Executive Leadership Development program that all senior directors and above would participate in focused on supporting the business strategy. We have continued this work and have created Leadership programs for our Directors focused on Personal Leadership and Global Mindset and for our Managers that is focused on Personal Leadership (leading self and others).

### **Lessons Learned:**

In order for us to be successful, we needed to:

- Align our work with the business strategy
- Have 100% sponsorship from the CEO and Presidents
- Involve senior leaders in the process
- Create powerful experiences that begin to shift perspectives and provide tactical tools in order to continue to use the learning

## Talent Development Strategies:

### *Applying Lessons Learned from Six Sigma & Lean for Continuous Improvement*



**Kery Mortenson**

Senior Manager



**Thomas Samuel**

Manager



**Marty Rosenheck**

Chief Learning Strategist

**Cognitive Advisors**



**Trina Moskalik**

Workforce Solutions Advisor



Total quality management strategies such as Six Sigma and Lean are very popular in manufacturing and related industries. These complex strategies will be reduced to their basic syntax and processes so that training and development personnel can implement them into their departments to achieve consistent results.

- Understand TQM processes such as Six Sigma and Lean in simple terms to apply to T&D departments
- Where can these quality strategies be applied inside of the T&D space?
- Leverage a Need Now-Learn Now Strategy by minimizing volume and maximizing impact for key business driver initiatives
- Focus on Predictable behaviors of talent at pilot stage
- Effective deployment of Lean and Six Sigma competency development

### **Discussion Points:**

To help guide this roundtable discussion, we'll encourage participants to share the following:

1. What current benchmarking are you using on internal T&D processes?
2. How do you make sure the quality of training is standardized across the company?
3. What actions are you taking to ensure learning processes are lean and effective?
4. What might you differently if you applied Lean principles to learning and development?

**CEO Insights:***Perspectives on leadership from current, former and aspiring CEOs***Jay Scherer**

Managing Partner

**Lisa Spitzer**

Vice President

**Jon Leatherbury**

Vice President

**Stella Cannon**

Director

**Jim Reilly**

Director



Join us for a discussion of the findings of BPI group's recent survey of current, former and aspiring CEOs, which provides a uniquely intimate look into the minds of CEOs and other very senior executives. Survey results provide collective insights from CEOs regarding the journey to becoming a CEO, describe drivers of satisfaction in senior leaders the relationship between personal satisfaction and success at the C-Suite level, and identify top advice by CEOs to aspiring CEOs. The survey also asks questions related to how CEOs and senior leaders view learning and development and to provide insight into their own development needs and plans.

1. How CEOs and senior leaders think about leadership, including what is good and bad leadership, and the single most-cited characteristic of great leaders
2. What drives senior leaders – their aspirations and needs
3. The best 'once piece of advice' that CEOs have for aspiring CEOs and other leaders
4. The most critical skills leaders need for success in the future to address the most important challenges
5. Why most leaders believe they should change how they currently spend their time
6. How senior leader's responded to the question, "What is your philosophy of leadership?"

**Discussion Points:**

To help guide the roundtable discussion, our facilitator will cover some or all of the following:

1. How would you describe your best boss ever?
2. How would you describe your worst boss ever?
3. Do most senior leaders have their own philosophy of leadership? Can they articulate it? Is it contemporary? Is it balanced with the needs of the organization?
4. Do you believe CEOs think differently about learning and development than HR and learning leaders? How?
5. What do you think the #1 and #2 development need is that was cited by CEOs

## Let's Get Real About Measurement Roundtable Panel



**Bala Swaminathan**  
Learning Manager



**Bonnie Evans**  
Director



**Rosemary Reilly**  
Commercial  
Development Leader



**Brad Thien**  
Director



We have been talking about measuring ROI for training for over 10 years. But are we just talking about it or have we moved to “doing it”? Are we still being asked by business leaders about the impact of learning? Does the industry we work in drive how we measure? How long has your organization been talking about measuring the impact of learning? Are you still talking about what to measure, what you will do with the information and how you are going to gather the data? Have you moved from talking about measurement to actually doing it and making decisions from the results? Our panelists are asking these questions and more within their organizations. We will have an interactive discussion sharing insights and thoughts on what measurement in the learning organization looks like today and thoughts on how to move it forward.

### Discussion Points:

To help guide this roundtable discussion, we'll encourage participants to share the following:

1. What do you consider key criteria for effective measurement and why?
2. What decisions are you making based on the results?
3. How do you know what you are measuring is aligned to the business?
4. What shifts in measurement are you seeing in your organization?



**Dave Lanier**  
Manager



**DJ Ray**  
Vice President



**Up-scaling the Quality of the Learning @ JCI:**  
*Practical Approaches for Sole-source,  
Development Model*

Dave & DJ will show you how Johnson Controls is up-scaling the quality of the learning using a sole-source development model.



**Sales Enablement:***Giving rainmakers access to learning in a 21st century way***Judy Albers**

Director

**Darin Hartley**

Vice President

**Cheri Minor**Global Sales  
Manager**Maureen Haga**

President

**Denise Hutton**

CLO

**Strategic Challenge:**

Today's sales force must be smarter to win. In the wake of the recession there are fewer people selling, but the goals, workload, and expectations for those who are have grown. You need to be busier than you were in the past and you must scrutinize every deal because there are fewer deals and opportunities out there. Your competition? It's fierce; and, as a result, pricing is under siege. Salespeople must make every effort to escape the gravity of commoditization.

**Discussion Points:**

To help guide this roundtable discussion, we'll encourage participants to share sales performance challenges, success stories and innovative experiments including:

1. What performance challenges does your sales force face?
2. How have you measured the business impact of your sales enablement initiatives?  
Share success stories.
3. What innovative sales enablement experiments are you conducting?
4. How do you onboard new sales hires?
5. What technologies are you using to enable sales force performance, and how are you using them?

## Successful Onboarding Strategies



**Sue Benbrook**

HR Staff  
Manager



**Peter Grassl**

Director, CIGNA  
University



**Matt Donovan**

Vice President



**Judy Braun**

Vice President

HEIDRICK & STRUGGLES



**Stephanie Lusk**

Principal  
Consultant



Whether it's a reflection of the new priorities of younger generations or the new realities from the changed economy, the employer-employee relationship has changed. To continue to effectively engage and retain talent, onboarding must evolve to meet the changing needs of new recruits. Panelists will share their experiences and their most effective tips and techniques for moving organizations forward through effective and compelling onboarding approaches.

### Discussion Points:

To help guide the roundtable discussion, our facilitator will cover some or all of the following:

1. Provide a brief overview of your onboarding program.
2. What is your #1 goal of your onboarding program? Has this changed over time? How do you measure it?
3. How has the role of the hiring manager changed? How do you effectively engage hiring managers to transition new employees?
4. What do you think is the ideal length for an onboarding program that is both effective and sustainable?
5. How do you balance the pros and cons of live versus self-directed training? How has this mix changed?
6. What is your most successful technique for helping new employees connect and integrate at work- either professionally or socially?
7. How you have integrated social media or mobile learning into onboarding?
8. How do you engage, and balance the needs and concerns of, multiple generations?
9. How do you balance corporate versus functional onboarding?
10. How is onboarding adjusted for a geographically distributed workforce?
11. How important is cultural immersion during onboarding? If important, what is one way you accomplish it?
12. Where do you see your, or other organizations, "fall down" the most?
13. What are you most proud of in your onboarding program?

## Key Trends for New Talent Development Reporting Standards



**Kent Barnett**

Founder & CEO



**John Northrup**

Executive Director



**Tom Simon**

Vice President



**Al Hazle**

Manager



**Sal Venegas**

Principal



### Strategic Challenge:

As an industry, we have struggled for years to address issues such as linking learning to business results and getting a seat at the table. We know we need to align what we do to the business and to demonstrate impact on the job, but we struggle with how to do it.

### Discussion Points:

This panel session will not only address those issues head on but also help us advance our industry's ability to develop reporting standards that are vital to our growth. During this highly-interactive panel session, here are a few of the topics we will cover:

- How do we develop a common terminology for metrics and reporting?
- How do we leverage reporting to engage business executives?
- How do we run Talent Development as a strategic business process?
- What measurement fundamentals should be required?
- How do we become world-class in measuring and improving our impact?

### Lessons Learned:

This lively discussion on *Key Trends for New Talent Development Reporting Standards* will address a number of timely topics and Kent will share information on a new website created by Dave Vance, <http://TDRprinciples.org/>.



**Dave Maciaq**  
Senior Manager



**Libby White**  
Director



## Linking Quality & Training to Improve Performance

### Strategic Challenge:

One way Health Care Services Corporation (HCSC) builds and maintains its competitive advantage is by consistently delivering high quality customer service to its members. Although each customer interaction is important and leaves a lasting impression, it is especially true when our members are dealing with a serious illness or emergency situation. HCSC's Learning and Quality functions maintain a close partnership to ensure our members' claims are processed correctly and they receive consistent, high quality service with each customer interaction. At HCSC, we realized the powerful results that this type of partnership can deliver when the customer service and responsiveness indicators were measurably improved as a direct outcome of organizationally joining the Learning and Quality functions under a shared services division.

### Learning Solutions:

While a supportive or even aligned learning approach can be collaborative, the partnered Learning and Quality functions go to the next step by sharing quality performance goals, access to data, and a common leadership that can drive integrated and focused actions. For example, historical data was used to identify specific error types and opportunities for improvement. After analyzing and reviewing information, key learning and non-learning solutions were implemented. These included instructor-led general lectures for group discussions, traditional web-based modules, innovative mini-movies, improved or enhanced process documentation, and process or workflow improvements.

To address knowledge gaps and reduce the number of errors, Learning created a series of short, task specific learning solutions. These solutions effectively pinpointed detailed operator actions that led to errors. Employees completed the instructor-led solutions in team huddles where they are able to discuss and review common errors. In addition, employees completed quick, self-paced, refreshers via the learning management system. In doing so, employees identified common mistakes, recalled operational fundamentals, and applied best practices associated with recent and specific trends. The self-paced content comprised web-based lessons with quizzes and innovative mini-movies that presented the topic in story form.

Learning and Quality collaboratively evaluated the learning solutions to objectively determine if the solutions meet employees' needs, provide the knowledge necessary to improve employee performance, and positively impact the business. The evaluation results demonstrated that when Learning and Quality partner to provide targeted and specific learning solutions and quality coaching and monitoring, both the learning experience for employees and customer service improved by an average of 60% for 10 unique learning solutions.

### Lessons Learned:

- Learning and Quality functional leads drive the program and regularly access the error trends, solution completion rates, and report results
- Solutions must be easily accessible and targeted to address only the specific knowledge gap
- All employees are required to complete the learning solution even if they have not committed an error
- Employees complete the solutions within the expected timeframe

## Best Practices: Employee Engagement Survey Metrics Driving Continuous Learning



**Karen Jones**

Manager



**Wendy Fencel**

Director



**Linda Stewart**

CEO



**Karri Konitzer**

HR Manager



Many organizations solicit input from their employee bases to gain insights into not only the level of engagement within their companies, but also what drivers of engagement need addressing to increase that level. Often, learning and development plays a critical role in creating and implementing initiatives and programs to meet employees' engagement needs. Regular surveying of associates leads to opportunities for moving the needle on engagement through a variety of continuous learning mechanisms.

Panelists will share their experiences in conducting employee research, and how their organizations use this information to increase engagement, identify learning and development needs and craft value-add programs to meet these needs.

### Discussion Points:

To help guide the roundtable discussion, our facilitator will cover some or all of the following:

1. How is engagement defined in your organization?
2. Describe what your company does in the area of employee engagement surveying
3. Describe how your company's employee survey results inform the learning strategy
4. Describe positive learning outcomes related to use of employee engagement survey data
6. Describe any area of risk or caution related to the use of employee engagement survey data to inform learning strategies
7. What programs or initiatives have your organizations embarked on to move the needles on engagement?
8. What's worked, or not?

## Creating a Culture of Service through Commitment & Engagement



**Janie Jewett**

Director



**John Pandl**

CLO



**Annette Caraulia**

Manager



**Jane Dowd**

Director



**Lisa Schumacher**

Executive Director



### Strategic Challenge:

As the healthcare industry continues to navigate change related to healthcare reform and the implementation of electronic health records, healthcare organizations must learn how to remain viable and compete in this rapidly changing environment. To accomplish this, organizations must create a culture of commitment and engagement through a consistent talent management strategy that is aligned with the business goals of the organization.

### Discussion Points:

To help guide the roundtable discussion, our facilitator will cover some or all of the following:

1. How & why do organizations create cultural transformations?
2. How do they sustain transformation?
3. How do organizations create talent development strategies that are aligned with overall business strategies?