

**Steve King**

Executive Director

**SIX CONVERSATIONS***8:30 a.m. Keynote***Strategic Opportunity:**

This session shares how findings from research on what employees expect and need from their managers was turned into a both a framework for a performance management system and, perhaps more importantly, a framework for managers to have performance improving conversations with those that work with them.

**About Steve:**

Steve King is the Executive Director of the Center for Professional and Executive Development for the Wisconsin School of Business at the University of Wisconsin–Madison. Prior to taking this position, Steve held the positions of Vice President of Global Talent Management for Baxter International, Senior Vice President of Human Resources at Hewitt Associates, and Chief Learning Officer at Hewitt Associates. Before joining Hewitt, Steve was with the Bank of Montreal’s Institute for Learning—the bank’s corporate university—where he was faculty head for leadership and change. He also held training and management development positions within Caremark and Harris Bank. Steve has an M.A. from the University of Wisconsin–Madison and a B.A. from the University of Iowa, both in economics.



**Dr. Beverly Kaye**

Engagement Scientist



## DEVELOPMENT CONVERSATIONS EMPLOYEES WANT

12:30 p.m. Keynote

[Download the first two chapters](#) of  
*Hello Stay Interviews, Goodbye Talent Loss:*  
*A Manager's Playbook.*

[Download the first two chapters](#) of  
the 5th edition of

*Love 'Em or Lose 'Em:*  
*Getting Good People to Stay.*

### Strategic Opportunity:

Career development continues to rank among the top global drivers for employee engagement, innovation and productivity. Employees need to learn that their managers are not responsible for managing their career...only their work. And managers need to learn that their role is to support the development process, to be a sounding board, and to provide the coaching that employees need for their continued growth. In this highly interactive session, leaders will learn a career conversation model that will enable them to be more effective at developing individuals so that their goals are in sync with the organization's business strategies and aligned with their own interests and capabilities.

### Discussion Points:

In this session, we'll explore:

- Learn a career development model to help employees self-direct their careers.
- Conduct development coaching conversations using specific questions & focused inquiry.
- Apply the essentials of career development to your own goals and plans.

### About Bev:

For more than 30 years, Dr. Kaye has delivered thousands of dynamic and motivational speeches at professional conferences and to corporate audiences world-wide. She addresses an array of talent management topics across industries and to audiences of all sizes.

Founder and Chairwoman of Career Systems International, Dr. Beverly Kaye is an international bestselling author and a leading authority in the world of modern workplace performance. She has dedicated her life's work to helping individuals and organizations grow in a workplace that fosters greater commitment, fulfillment, and humanity.

Beverly Kaye and the CSI team provide cutting-edge and award-winning talent development solutions primarily to Fortune 1000 companies. Her work and research are distinguished and widely recognized for helping others discover greater meaning in their work and gain greater control over their career destinies. She completed her graduate work at MIT's Sloan School of Management and holds her doctorate from UCLA.



**Kevin Oakes**

CEO



## **WHY TALENT MOBILITY MATTERS**

*1:30 p.m. Keynote*

### **Strategic Opportunity:**

In the competitive global marketplace, providing high-value employees with latitude to take on new roles is a strategy high-performance organizations use to attract and retain top talent. But building a culture of mobility—one in which managers are invested in both developing their best people and offering them opportunities for new assignments—requires a mindset that prioritizes mobility as a talent development strategy and bases the performance reviews and incentives of leaders on how well they develop the next generation of talent.

This transformation can be challenging, but the payoff is clear: the Institute for Corporate Productivity's (i4cp) talent mobility study of more than 650 global organizations found that prioritizing talent mobility directly correlates to market performance. Unfortunately, half of these companies report that talent hoarding by managers is the leading obstacle to creating mobile workforces.

### **Discussion Points:**

In this session, we'll explore:

- How high-performance organizations address talent mobility
- The challenges they face building cultures that encourage the movement of talent
- Next practices for talent mobility in use by leaders around the world.

### **About Kevin:**

As CEO of i4cp, Kevin provides strategic direction and vision, and is responsible for the overall operations of the organization. Kevin has been a pioneer in the human capital field for the last 15 years, and is a frequent author and international keynote speaker on topics such as talent management, leadership, innovation, metrics and strategic learning in organizations.

Prior to founding i4cp, Kevin created SumTotal Systems, (NASDAQ: SUMT), the world's largest learning management system company and the industry's leading provider of talent development solutions.

## Deeper Dive into Helping Teams Increase Performance

### Roundtable Discussion

9:00 a.m.



**Michael Grubich**

Sr. VP,  
Talent & OD



**Angie Zeigler**

VP Talent  
Management



**Mark DiGiacoma**

Formerly Director  
Leadership Development  
Crotonville



**Steve King**

Executive Dir



As talent development professionals, we have to find a way to bridge the traditional classroom perceptions with experiences outside the classroom in order to develop strong bench strength for leadership in our organizations.

During this roundtable panel discussion, senior talent and leadership development executives will share stories, case studies, lessons learned and best practices on a framework for managers to have performance improving conversations with those that work with them. And, perhaps more importantly what employees expect and need from their managers.

### **Discussion Points:**

To help guide the roundtable discussion, our facilitator will focus the panelists on some or all of the following discussion points...

- What are recent trends with development solutions trends for middle managers?
- Which are specific leadership skills and competencies for middle managers?
- Describe what makes for a successful transition from front line managers or individual contributor to middle manager?
- How is succession planning for middle managers handled in your organization?
- Why are middle managers so important to business strategy?
- What challenges are middle managers facing today they were not facing a decade ago?
- How do we help middle managers tune in to the needs of the business?
- How is program(s) designed to accelerate development?



**Kery Mortenson**  
Sr. Manager Training  
Effectiveness



**Tim Gillum**  
Sr. Manager  
Quality - Training



## **Creating a Strategy Plan for Mid-level Managers to Engage & Retain Millennials.**

Developing an Organizational Strategy  
in 4 Hours Workshop? *YES Really!*

10:15 am – 12:15 pm  
2:15 – 3:15 pm

Executive Summary & Report Out  
4:30 p.m.

### **Strategic Opportunity:**

The current business environment is full of new and exciting challenges for learning and performance leaders to navigate. We are in the midst of a generational changing of the guards with respect to workforce leadership and the evolution of technology at a more rapid rate. As a result, organizations are required to ensure that their mid-level managers engage & retain millennials. It is within this opportunity that learning organizations cannot rely on existing processes to create strategies that hit the target with significant impact. Instead, we have learned how to get ahead of the curve and rapidly drive systematic alignment and improvement.

### **Workshop Overview:**

This workshop will provide the hands on approach to leverage a creative blend of performance technology tools with the strategic needs of the organization. The innovative nature of this approach breathes new life into the tried and true standards for developing a robust strategy that is fast, focused, fun and sustainable.

The workshop simulates creating an organizational strategy at the ever-changing pace we work in. We begin with the end in mind using a magic wand to establish the desired state. We then introduce the following predictive tools and methods to:

- Interrogate reality by defining the official truth from ground truth
- Identify and categorize causal factors using a rapid performance analysis
- Target solutions that eliminate barriers using a “21 activity”
- Predict strategic direction and actions using a modified SWOT analysis
- Isolate key behaviors critical to fuel the desired results with impact
- Assess the appetite for change with stakeholders using a simple culture pulse
- Provide an executive summary with immediate next steps with assigned actions

### **Outcomes:**

- Apply a comprehensive strategy for an organization using rapid simple & predictive tools
- Identify targeted solutions using an effort/benefit matrix
- Conduct a rapid performance analysis using systematic cause analysis
- Provide stakeholders guidance on taking strategic action using a modified SWOT
- Create an executive summary that drives accountability

## Revamping Annual Performance Management Shackles:

*Upskilling managers on giving feedback, promotions & compensation -- 10:15 a.m.*



**Mary Jo Burfeind**

VP,  
Enterprise Talent &  
Dev.



**Bala Swaminathan**

Global lead,  
Employee Engagement  
and Measurement



**Steve  
King**

Executive Director



### Strategic Opportunity:

In highly competitive markets, retaining talent is only part of the equation for many companies to achieve ambitious goals—equally important is to unshackle talent management processes in a way that creates and fosters a collaborative environment enabling deeper connections, agile and customer focused workforce and innovative mindset. Critical to both the execution of many business & continuity plans is to provide employees with autonomy and empowerment, meaningful work, strong team-based environments with opportunities to collaborate & innovate, and strength-based coaching.

### Discussion Points:

To help guide the roundtable discussion, our facilitator will focus the panelists on some or all of the following discussion points...

1. What are the top two programs, cultural components and/or other initiatives you have implemented (or are about to implement) to build manager capability around delivering effective performance management conversations?
2. For those organizations who have removed ratings,
  - a. How can we ensure the right conversations happen?
  - b. Do you worry about the quality of the conversation?
  - c. How should we reward high achievers?
    - i. How do you plan to address pay differentiation?
    - ii. What parameters will be used for promotions?
  - d. What are the biggest implementation challenges companies can plan to face?
    - i. (i.e. global implications from Unions, Works Councils, Upskilling Managers, Communicating the new philosophy broadly to employees).
3. For those organizations who have not removed ratings, is the quality of the conversation a consideration as to why you do not want to remove ratings?
  - a. Without annual performance management ratings:
4. If you could look into a crystal ball ten years from now, what is your predication on the topic of performance management and ratings?

**Development Conversations:***What's not working? Getting the right diagnosis before jumping to a solution*

10:15 a.m.

**Jane Shlaes**Director  
Learning & OD**Kym Anqlin**Manager,  
Learning & OD**Joanne Petterson**Specialist,  
Learning & ODCOLLEGE of AMERICAN  
PATHOLOGISTS**Strategic Opportunity:**

Professional development is one of the most powerful and underutilized tools managers have to drive engagement and results. Yet, managers across organizations have significant room to improve the quality and frequency of employee development discussions. Our employee surveys tell us so. This becomes an even bigger issue as organizations become increasingly complex and depart from traditional performance review systems which drive many of the current conversations. Our job is to close the gap, but how?

**Learning Solution:**

Seek first to understand...

Learning professionals have long struggled with this challenge, but do we really understand the root causes? Are managers or employees simply unmotivated to have these discussions? Do they struggle with the skills to do it effectively? Do we have effective support systems that make it easier or harder for these discussions to take place? Do others encourage the behavior? Or, is it all of the above? Before jumping to more training or "requirements," take a moment to diagnose the real issue to get to the biggest root cause(s).

**Lessons Learned:**

At the College of American Pathologists we are pausing to diagnose before moving forward with additional learning solutions. In this interactive session we will share our approach to a "development discussion diagnostic," followed by an opportunity to participate in a "learning community" diagnostic with participating ELE colleagues.

**Christopher Lind**

Head of Regulatory  
Affairs Training

abbvie

**WIFM:**  
*A New Way of Engaging Team Members using a MOOC*  
10:45 a.m.

**Strategic Opportunity:**

Great leaders know the importance of engaging their teams. Employees want their managers to play an active role in their development and have them take an interest in their growth. How leaders engage their teams is critical in the perception, feeling, and reality of whether the organization is concerned and interested in an individual's growth and career success. The problem is how to do this in a "no-time-to-do-it" and "we don't have the money" environment.

In this session, *WIFM: A New Way of Engaging Team Members*, we'll explore how one organization is capitalizing on the benefits of MOOCs to accomplish this.

**Objective & Outcomes:**

- Hear one organization's story of implementing MOOCs as a development tool
- Explore the benefits of developing teams and individuals using a MOOCs
- Eliminate common excuses for putting development on the back burner



**Kari Wendorf**

Director  
of Training

**Colleen Hill**

Bilingual Sales  
Education Trainer



**Flipped Virtual Classroom:  
Maximizing Adult Engagement**  
2:15 p.m.

### Strategic Opportunity:

In 2014, the Combined Insurance Learning & Development Team launched a blended approach to our New Agent Education, combining a traditional classroom experience with online learning, Virtual Product Training, and in-field training. Through strategic technological implementation, this New Agent Sales Training Program delivered significant cost savings to the organization and deeper learning for adult learners.

Although the strategy was sound, change can be difficult for any organization. In 2015, engagement and completion rates in classroom training remained high; however our Virtual Product Training engagement levels were lower and inconsistent.

Our greatest opportunity in 2016 is to develop and deliver a Virtual Education Program that maximizes student engagement and alters student mindset from “mandatory training” (i.e. I have to be here) to “value-added training” (i.e. I want to be here).

### Learning Solutions:

We resolved to improve our engagement levels and effectiveness by:

- Gaining a better understanding of our field partners, our New Agents and their learning environments
- Redesigning our Virtual Product Training curriculum to better reinforce our, “Right Start New Agent Development Program,” and increase activity and participation
- Developing a metrics tool that allows both Field Leaders and the L&D Team to quickly identify trends, opportunities and risks

### Keys to Success:

- Being on the “cutting edge” requires staying on the uncomfortable edge - we must always be looking for ways to improve the design and delivery of our education
- REALLY knowing our audience means: Understanding their environment; Putting their needs first; Listening versus telling and teaching; Watching versus presenting
- Virtual education must be activity-based and engaging, always design it based on adult learning best practices

**Christopher Lind**Head of Regulatory  
Affairs Training**Heidi Hattendorf**Director,  
Employee Learning

**Learning as a Strategic Partner:  
Adding Real Business Value**  
2:15 p.m.

abbvie

**Strategic Opportunity:**

As longstanding businesses are being disrupted and new businesses are being formed at record pace, it has never been more critical for companies and teams to update their skills and sharpen their capabilities. At the heart of this transformation is the critical need to develop Talent around the business, teams and individuals and be competitive. There are significant variances on how companies embrace Learning and Development including where it reports, priorities, how it is funded and relationship with the business. The opportunity we have as Learning Professionals is to be that Strategic Business Partner to further the skills, strategy and growth of the company through People.

**Discussion Points:**

This highly interactive roundtable discussion will focus on 4 key vantage points for being a strategic business partner:

1. **Priorities & Organization:** Gain a perspective on how other organizations *invest in Learning & Development* and a clear view on the priorities are. We will compare different models on where Learning reports to as another data point on business alignment.
2. **Measurement & ROI:** Insights into how other organizations then *measure Learning and impact*, practical ideas on where you can then apply this into your organization depending on your priorities.
3. **Technology:** Snapshot of *latest tools and technology levers* which help teams scale and multiply efforts. Make contacts with colleagues for further follow up and discussion.
4. **Aspiration for Growth:** Challenge to all of us on where *we can have greater business impact* and be a closer strategic partner to drive growth.



**Pam Tate**  
President & CEO



**Mary Jo Burfeind**  
VP, Enterprise  
Talent & Dev



**Business Champions &  
UpSkillAmerica**  
2:45 pm

### Strategic Opportunity:

There are millions of job openings in the United States but companies cannot find workers with the right skills, training and credentials to fill them. The inability to find a talented pool of workers with the right skills to fill these jobs constrains industry growth and hurts our competitive edge. By 2020, 65% of jobs will require a college degree or postsecondary credential. We're facing a shortage of 5 million skilled workers for these types of jobs. Businesses must invest in more strategic ways to help their employees get college degrees. Business Champions are committed to getting more business leaders nationwide to invest in ongoing education, training and career advancement support for their employees.

### Program Overview:

- Business Champions: How an employer-led movement is addressing the national skills supply & demand problem.
- Implications of upskilling for Health Care Service Corporation.
- Positive ROI supports workforce investment.

### Lessons Learned:

- How Business Champions helps companies enhance talent development.
- How HCSC's successful programs and initiatives for its front-line workforce link to Business Champions' overall strategies.
- The evidence from an ROI analysis demonstrates that credentialing the front-line workforce saves money for the company and advances the employees.

**Help us spread the word:** Business Champions companies are establishing thought leadership and are seen as role models for other companies looking to become a preferred employer and recruit better talent. Learn how you can contribute in sharing best practices identified to address the talent gap and shortage of skilled workers in the U.S. by visiting [businesschampions.org](http://businesschampions.org).

**John Contant**

Manager,  
Talent Management

**Felicia Hepburn**

Sr. Talent  
Management Analyst

**Baxalta**

## Engaging New Hires on Day 1:

*Less is More*

3:30 p.m.

### Strategic Opportunity:

From our first dates to our job interviews, the adage “You never get a second chance to make a first impression” rings true. Yet so often our companies struggle to bring our best selves forward on an employee’s first day. The urge to communicate “critical” information overwhelms us and we proceed to walk our new hires through the details of lengthy powerpoint decks, reviewing each slide in detail to ensure our new hires are “taught” this critical information. Sound Familiar?

The research is compelling: Effective orientation and onboarding creates positive first impressions and actually influences how long our new hires will stay with us.

To us, the answer became clear. In order to make a great and lasting first impression, we had to realize that less is actually more.

### Learning Solutions:

If this is true – If first impressions are that important and less is more – where do you begin? Is it really worth it? As we considered the idea of overhauling our New Employee Orientation in the midst of significant organizational change, we began to wrestle with:

1. Is Orientation worth evolving? Or is it a pill that we just need to swallow?
2. Take an honest look in the mirror: What do Employees Experience in Orientation?
3. How is Culture experienced in Orientation?
4. What do we want our New Hires to remember?
5. How will we know this is working?

### Lessons Learned:

1. Less is More: Picking 3-4 “Moments that Matter”
2. Intentionally engage their heads and their hearts
3. Experiment: Be willing to play
4. Give up Control: Facilitation trumps presentation
5. Measure
6. Don’t hide your work! Get Feedback

**Alex Draper**

President

**Missy Gonzales**Director,  
Leadership  
Development

**Experiential Learning:**  
*How to Effectively Use  
to Improve Leader Development*  
3:30 p.m.

### Strategic Opportunity:

Experiential learning is now at the heart of many leadership development programs—widely known as the most effective form of learning. Yet the research from our friends at I4cp explain that executives say 67% of our leadership programs don't work. If experiential learning is the process of learning by doing, we do not learn just by the doing. The key is learning through reflection on doing. All our investments to harness the power of experiential learning are wasted unless we figure out how to ensure effective reflection is taking place.

### Learning Solutions:

To harness the true value of experiential learning, we first need to understand where we're missing opportunities. From both research and my own experience of putting 4000 leaders through a formal experiential learning solution, we'll walk you through how to enhance what you currently do in and out of the class.

### Lessons Learned:

1. What really is experiential learning?
2. Identify where we are missing opportunities to harness the power of experiential learning
3. What can you do every day to improve yourself as a leader?

**Jenny Murnane**

Director

**Narrow Tomorrow's Talent Shortage:  
*Developing and Measuring Outcomes  
for a High-Performing Workforce***  
3:30 p.m.**Strategic Opportunity:**

Bellevue University's corporate partners have created unique learning and development opportunities within their innovative organizations. They are growing their talent pipeline even in the face of the economic, demographic, and technological changes currently taking place in the broader workforce. Dr. Murnane will discuss how Bellevue University's Human Capital Lab has worked with organizations to help strategically align innovative learning programs which impact organizational outcomes and how they are measured. Key performance indicators like retention, performance, customer service, and engagement are being positively influenced. Once the initial outcomes are measured, it is important to use these results for continuously improving the programs.

**Learning Solutions:**

Jenny will share the details of how other organizations have approached the development of their learning programs. The Human Capital Lab's process of mapping human capital investments in learning and development initiatives to business outcomes will also be outlined. Attendees will have the opportunity to begin thinking about the alignment and mapping of their own learning and development initiatives.

**Lessons Learned:**

- Even the most financially driven metrics can be tied back to learning and development initiatives
- Working with collaborative partners and internal stakeholders from the very beginning of program development, not only creates buy-in, but can lead to highly impactful results
- Never stop thinking of new paradigms for approaching the development of a high-performing workforce



**Mike Grubich**

Sr. Vice President  
Talent & OD



## Linking Talent Processes to Become the Employer of Choice

3:30 p.m.

### Strategic Opportunity:

Aurora aspires to be an employer of choice for diverse talent to do their best for those we serve. In fact, all our strategic initiatives are predicated on having the best people, who deliver service and true hospitality in a manner that differentiates Aurora from our competitors and builds trusting partnerships with those we serve. We will identify and cultivate the core competencies our future state requires and give our people the opportunity to succeed. Toward that end, we will develop leaders who create an inclusive culture where our people are inspired to achieve their potential and deliver exemplary service. As part of our strategic plan, our goal is to be nationally known for leadership in many aspects of healthcare and to become a destination employer. How we get there is through one “Game Changing” priority ... having the Best People!

So the question becomes, how do we evolve an industry that has been solely focused on technical expertise and patient satisfaction and transform into a learning organization which adds engagement, caregiver development, innovative learning solutions, best-in-class talent management and leadership capability as a core competence. Our goal ... integrated approach to managing talent, our competitive advantage. This leads us to be the innovative employer of choice in the markets we serve.

### Discussion Points:

- How do we shift the mindset from traditional technical expertise towards a focus on exceptional leaders?
- What steps can we take to evolve to a workforce of highly engaged caregivers?
- How do we anchor an integrated approach to talent management, which also addresses our goal of becoming a more inclusive and diverse environment?



**Cheri Wolf-Schulman**  
Director, OD



**Lori Creed**  
OD Consultant



## Experience Froedtert's Coaching Collaborative Workshop

3:30 – 4:30 pm

### Strategic Opportunity:

In our current business environment, many now believe that characteristics labeled “coaching culture” are really “leadership culture”, meaning a culture that values the development of leaders at all levels and in all parts of the organization. Research from the Center for Creative Leadership (CCL) suggests that attitudes and behaviors associated with a coaching approach represent an important enabling element in organizational cultures associated with innovation, collaboration, and learning agility.

### Workshop Overview:

The Froedtert Health Coaching Collaborative is a facilitated group coaching learning experience. Since launching in 2014, cohorts of diverse leaders (different locations, services, temperaments, and generations) come together for one full day each month for six months to discuss their work, share lessons learned, best practices, and create efficiencies through shared knowledge. Leaders learn how to manage change in a learning organization while they develop peer relationships across the organization. Broad goals of this learning experience include development of coaching, reflection, and action learning skills. More specific objectives include:

1. Spread core coaching skills: more people can get coached in a group; thereby, more quickly cultivating a coaching culture.
2. Transfer results of coaching more effectively into the workplace because the nature of group coaching is very similar to the nature of teams in the workplace.
3. Accomplish prompt actions and results in the workplace as group members and peers share support and accountabilities to take those actions.
4. Create a culture of learning and reflection across entities within the organization.
5. Build a sense of community by decreasing the sense of silos and isolation that leaders can sometimes experience.
6. Cultivate a learning organization where leaders/staff are regularly engaged in deep reflection, learning, problem-solving and sharing.

This workshop will introduce the model and framework, a sample learning activity modeling right brain/left brain experiential learning, and provide an opportunity to experience the group coaching process.

### Outcomes:

- Identify principles of a successful group coaching model.
- Describe how active listening, reflective questioning, challenging assumptions, and giving feedback serve as a foundational framework for this immersive learning experience.
- Experience a modified version of a group coaching experience focused on work-life balance.



**Molly Murnane**

Director

**High Potential and High Performer Alignment**

10:15 a.m.

**Strategic Opportunity:**

Organizations struggle with leveraging the talents and skills of High Performers and High Potentials after their initial role. According to Harvard Business Review, nearly 40% of internal job moves made by people identified by their companies as “high potentials” end in failure and 12% of all high potentials are actively searching for a new job.

**Learning Solutions:**

- What is the difference between a high performer and a high potential?
- How do I keep my high performers and high potentials engaged?
- What are the common mistakes organizations make in their succession planning?
- How do I know my company is successful at talent management?

**Lessons Learned:**

Successful talent management is possible when capabilities, career goals and company strategy are aligned.