April 10, 2007

Learning Director: Are You Ready For Your New Role?

by Claire Schooley

TRENDS

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by Claire Schooley
with Connie Moore and Diana Levitt

EXECUTIVE SUMMARY

Today's learning executive must combine leadership, communication, business acumen, and innovation with learning expertise to drive higher performance and create strong business results. To accomplish this, the corporate learning executive's role must be well aligned and tightly integrated with the organization's business goals and needs, no matter where the individual's role sits in the org chart and no matter how strong the learning exec's background is in education. Innovative companies that have pushed beyond traditional training departments no longer treat learning as simply running an efficient training department. Rather, the learning program is directly linked to employee effectiveness and organizational success, making the learning executive more accountable to the business. The procurement of learning, orchestration of the learning program, and presentation of training classes are only one part of the job. The most critical aspect? Making sure that learning initiatives move the needle on the dial measuring employee performance and key business metrics.

NOTES & RESOURCES

Forrester interviewed learning leaders in financial services, retail, research, and technology.

Related Research Documents

"Learning And Talent Management Join Forces"
March 30, 2007, Trends

"Knowledge, Learning, And Work Unite!"
February 17, 2007, Trends

"Trends 2006: eLearning Goes Informal And Moves Closer To The Worker's Job"
April 19, 2006, Trends

Information and knowledge management professional

THE LEARNING EXECUTIVE'S ROLE HAS BECOME MORE BUSINESS-CENTRIC

Historically, learning executives led their learning departments as units that were quite separate from the day-to-day business of their organizations. Learning departments decided what kind of training employees needed in areas like onboarding, technology skills, compliance, and other skills related to the business and their roles as employees. Classroom training was the main learning approach, and classes were often multiple-day sessions. New instructor-led courses were developed mostly in-house with some content training from external sources. If training included eLearning, these were mostly off-the-shelf courses secured from content vendors. The executive branch saw training as a necessary cost drain on the organization.

Today, few training organizations offer trainer-led, generic classes as the exclusive learning solution.[1] Web-based classes, coaching, mentoring, blended learning, on-the-job training, just-in-time learning, and contextual learning are all valued methods. Competition in the global market, shrinking corporate resources, the need to show results no matter what the circumstances, and the retention of talented and skilled people have challenged and even pushed enterprises to look at training departments in a different light. The emergence of multiple learning approaches that tie directly to corporate needs mitigates some of these challenges and is now causing many business executives to view training as an essential investment in their human capital, rather than a cost sinkhole or budget drain.[2] As a result, the learning executive's responsibilities today extend far beyond the training department, and the business *expects* the learning exec to be attuned, informed, and responsive to the organization's diverse employee development needs.

EIGHT LEADERSHIP FUNCTIONS THAT REQUIRE A DEEP UNDERSTANDING OF THE BUSINESS

As a learning executive, you must closely align learning with the organization's core business processes. For learning to help employees meet corporate, departmental, workgroup, and individual goals, you must take a holistic view of employee training — not a course-centric one. The most important question to ask: What are the critical areas of investment in people? Answering this question requires opening direct communication channels with top company executives to understand the business strategy and road map and then to align and create appropriate formal and informal employee learning experiences that support the road map. As a learning executive, you must have the expertise to function in the following capacities (see Figure 1):

- **A *communicator* who articulates change management.** This is a huge role today for learning executives. You must work in partnership with business leaders to understand companywide initiatives, making sure that the training department implements learning activities aligned with

these broad initiatives. For example, one learning executive in a research company talks about her key communication role in executive strategy sessions:

> "I lead the initiatives with executives. We discuss the workforce changes necessary and how we will support these changes with employee learning experiences. If the goal is to reduce time to productivity by 25% over the next year, we decide what key components must be put in place in the departments to make this happen. For learning, it might include a streamlined onboarding program, a formal coaching program, or upgrading employee technology skills. I'm both a communicator and a community builder to make sure people have the skills and tools that they need to meet the company goals."

- **An organizational effectiveness *consultant* who keeps employees skilled.** A learning executive in financial services told us: "In the last two years, I've spent much more time working with executives looking toward the future and planning staffing. This is a major change in my role as a learning leader." Once executives articulate the business strategy, the learning executive is responsible for aligning training for all levels of employee performance. Executives must ask: What are the skill gaps, and what learning experiences will close them most effectively? The solutions could include formal classroom and online courses like compliance, as well as informal learning experiences such as coaching, online communities, and robust search tools. The blended approach allows the learning staff to mix and match learning approaches into a comprehensive program to provide workers with necessary skills.[3]

Figure 1 A Learning Executive Is Part Of The Business Fabric

LEARNING EXECUTIVE

Roles	Activities
Internal communicator	Champions innovative learning approaches
Internal consultant	Manages LMS for employees and customers
Learning innovator	Collaborates with marketing to deepen the customer experience
Learning technologist	Oversees governance of learning strategy
HCM integrator	Collaborates with IT on best learning technologies
Business-savvy educator	
Learning and knowledge manager	Communicates business strategy
Organizational change agent	Consults with LOBs on learning needs

41348   Source: Forrester Research, Inc.

- **An *innovator* who is always looking for new approaches to learning.** As a learning leader, you must always seek the most appropriate and flexible learning methods, given the learning goals. For example, making content available on handhelds provides flexible, just-in-time learning and may be very effective for short nuggets of learning. One retail training executive said: "We are developing content today as reusable learning objects, and we deliver both employee learning and consumer assistance on handhelds. For example, a sales associate can scan a shoe with the handheld device and bring up a text sheet to answer a customer question, a 4-minute learning module required by associate's online learning plan, or even a 4-minute movie about a product — great for the visual learner — all through the same interface. I must constantly innovate; it's a company expectation."

- **A *technologist* who is aware of resources available to assist in the learning process.** The learning executive needs to understand the technology resources available to facilitate learning and decide what technology makes sense, given the nature of the company and the learning required. If the learning is provided on-demand, as in the case of software-as-a-service (SaaS), IT's involvement is minimal; if the learning technology is installed, decisions must be made in collaboration with the IT department.

- **An *integrator* who makes employee performance and learning seamless.** The learning executive's job is much broader than just providing learning. The role even includes support for managers to help their direct reports develop and succeed. Within human resources (HR), learning and performance are becoming tightly integrated.[4] The performance component manages the onboarding of employees and maps their skills to job competencies. The individual learning plan prescribes learning experiences to fill these gaps, as well as compliance courses required by the organization. Quarterly performance reviews assess employees' job success and may be tied to career development or succession plans for advancement. The learning may include coursework, but it also provides learning activities on the job, such as special projects, serving on cross-functional teams, and skill-stretching job assignments. The learning executive and the HR executive should work together closely to assure that the right talent is hired, receives appropriate training, and is offered clear growth opportunities.

- **A business-savvy *educator* who understands business acumen.** As a learning executive, you must have an overall big picture understanding of the business and its interrelationships, enabling you to make better business decisions. You must determine what business goals are most essential, make these a focus, and prioritize the learning budget. You must understand budget development, ROI, and company fiscal procedures and know how to make negotiated investments in software. A financial services learning executive told us: "If I had to hire a learning executive today, I'd err on the side of strong business experience. Business acumen is more important today than a strong learning background."

- **A content creator and *manager* of learning and knowledge experiences.** The learning executive must create a learning framework, involve SMEs in the content development (whether those are internal or outsourced resources), and have state-of–the-art tools for Web-based content development and learning management.[5] Content includes instructor-led courses and Web-based learning modules in self-paced or virtual classroom formats. Other content resources include off-the-shelf simulations, context-sensitive learning within an application, job aids, expert location, coaching, and easy document search.[6] For example, a financial services learning executive believes that learning and knowledge management cannot be separated: "Today's corporate learning includes both formal learning and informal knowledge. Both must be managed by the learning executive for holistic employee learning."[7]

- **A *change agent* within the organization.** The learning executive must anticipate and understand the impact of new initiatives or strategies and plan appropriately so that employees will be ready to perform successfully when the new business approach or procedure is operational. New strategies require changing employee and manager behavior. These employees need continual exposure to these changes during implementation. The learning executive constantly looks toward the future: In a year or two years, what will the solution look like? What about the audience and its needs? And what resources will enable us to get there? Proactive planning is much more effective than reactive chaos. As one technology learning professional said: "Strategic planning for learning has had a big impact on our success. We do it seven to 10 months ahead."

eLEARNING CAN — AND SHOULD — HAVE MANY HOMES

The decision of where to place eLearning within a company's organizational structure is a challenge. Some may say, "Well, that's easy — it belongs in HR," Maybe, but that answer may not be best suited for the organization. In reality, eLearning finds homes in five different areas of the business and may have multiple homes throughout the enterprise for different learning activities and functions (see Figure 2):

- **HR is the most common department for managing the learning program.** A range of learning and development activities — whether online or face-to-face — are managed by HR. Learning is tied to performance and career growth. HR takes care of onboarding, and a lot of procedural learning at companies is now online.

- **IT can house the eLearning system.** The learning management system (LMS) is a key technology that needs managing and supporting just like any other system. Organizations that produce in-house courses or shorter learning modules using a variety of different kinds of media rely heavily on IT. IT's role in learning will increase substantially as second-generation learning deployments morph into next-generation systems that support contextual learning, embedded learning, informal learning, and just-in-time learning — delivered through information services and business services.

Figure 2 Pros And Cons Of Different Business Sectors Managing eLearning

	Pros	**Cons**
HR	• HR is the traditional location for eLearning and is an employee comfort zone. • This enables easy integration with the other kinds of learning that HR offers. By combining these programs, it becomes easier to achieve a blended learning solution.	• HR doesn't always understand eLearning development or have knowledgeable eLearning staff with instructional design and development backgrounds. • eLearning may stay HR-focused and not expand to other LOBs.
IT	• IT has strong technical expertise that may include some instructional design and content development knowledge to provide strong custom content development expertise. • This ensures that the network capacity and other infrastructure supports eLearning activities and the LMS integrates well with other organizational systems.	• IT often lacks the eLearning methodology and education expertise. • IT focuses more on the technology than on the learning and performance improvement; ultimately, the focus should be on the training outcomes and results.
Marketing/sales	• Marketing or sales can closely align internal learning and product strategies in heavily customer-driven learning environments or can embed learning into the customer experience in a way that shows measurable business results. • Marketing and sales possess expertise in launching campaigns and spreading the word about internal resources that affect customers, sales, or products.	• eLearning may compete with other higher-priority requirements and not get the attention it needs. • Sometimes, marketing has few technical people; this requires a good IT relationship to handle or advise on LMS management and the supporting technology.
LOB	• This enables fast development of content by subject matter experts using easy-to-use, rapid eLearning development tools. • This focuses on specific LOB learning needs.	• This enables duplication of learning expertise in the LOBs. • LOB may not be equipped to develop content aimed at the whole organization.
Separate department	• This allows the eLearning to be the primary focus, especially the development of custom eLearning content. • A separate department has expertise, tools, and financial backing to produce quality programming.	• A separate department can becomes isolated unless the department has a visionary leader and develops excellent communication strategies with other parts of the business.

41348   Source: Forrester Research, Inc.

- **Marketing makes perfect sense if your eLearning is closely linked to success in sales.** Most people do not think of eLearning managed by marketing. But it makes perfect sense if your eLearning is closely linked to your success in sales. In this situation, the sales force and support organization needs to know about the company's products and services, and marketing's role is to ensure that the sales organization has got the right information to make it look smart. Also, this same information that is accessed internally can help sales associates when they look up information on their handhelds and give the customers an answer.

- **The organization can create a dedicated business unit or special department.** Sometimes, eLearning doesn't seem to fit well anywhere but is critically important to the organization's strategic goals for people development and business growth. In these situations, the CEO or COO creates a new department reporting directly to the top executive or other C-level executives. The department usually does a lot of companywide production, as well as production for the LOB. Members of this eLearning department consult to business units like R&D, sales, operations, and customer service that may already create some of their own short productions. Organizations use this eLearning approach to produce a large amount of in-house content.

- **Lines of business (LOBs) often take on eLearning.** It's fairly common for LOBs to produce their own eLearning content that is distributed through the organization's enterprise LMS. A central corporate eLearning group may also exist that produces or acquires content, such as sexual harassment or diversity courses, that is appropriate for many or all departments.

So what's right for your organization? Take a look at each of these options, and decide which one will give you the efficiency and flexibility needed within the eLearning function. Maybe there's no single answer, and eLearning is dispersed in several pockets of the organization. In situations where eLearning is distributed throughout the enterprise, one department must take responsibility for the LMS and governance and provide strategy direction to assure achievement of objectives and management of risks.

R E C O M M E N D A T I O N S

LEARNING EXECUTIVES MUST TAKE A BROAD PERSPECTIVE ON THEIR ROLES

Although learning is the main responsibility of the learning executive, the job entails many other coordination and leadership roles, and business insights and experience are a prerequisite. As a learning executive, make sure that you:

- **Establish a direct communication channel with the company executives.** You must also work to create a clear understanding of the importance of learning in developing and retaining skilled employees. The quality of the employees' knowledge and experience is a differentiating asset and is closely linked to the organization's competitive advantage.

- **Hire learning/training staff with strong business knowledge, as well as learning expertise.** Encourage and reward innovative thinking on nontraditional learning approaches, such as embedded training and simulations. But also reward a keen sense of business acumen that keeps learning aligned with business goals, with a constant eye on business measures of learning success.

- **Use a 10- to 12-month planning window.** Proactively plan learning experiences, cultural change initiatives, and other employee behavioral change activities at least 10 months to a year ahead of the start of any company initiative.

- **Get out of an instructor-led training paradigm.** Examine the many learning options that are available in addition to instructor-led training, such as coaching, Web-based simulation and gaming, contextual learning, and search. Implement the ones that fit best with the culture and work of your organization.

- **Make it a practice of meeting with LOB managers on a regular basis.** Make sure to understand their employee performance needs. Incorporate these needs into your long-term and short-term learning plans.

- **Create a learning culture that understands and values both formal and informal learning.** These should be ongoing activities that are critical to employees' job successes and a part of their job responsibilities.

ENDNOTES

[1] According to the American Society for Training & Development (ASTD), instructor-led real-time training has decreased in percentage of hours from 78% in 1999 to 53% in 2006, while technology-based training has increased in percentage of hours from 14% in 1999 to 40% in 2006. Source: ASTD, "State of the Industry in Leading Enterprises," 2006.

[2] Today's competitive market puts incessant pressure on enterprises to keep their employees highly skilled and productive. In response, enterprises are beginning to tie eLearning to work activities, delivering both on-demand (embedded into applications) and just-in-time (a click away) learning, all within the context of business apps. See the April 19, 2006, Trends "Trends 2006: eLearning Goes Informal And Moves Closer To The Worker's Job."

[3] Blended learning means selecting the best learning mode for the specific content. The blended learning fabric may include classroom instruction, eLearning, coaching, print resources, lectures, etc. See the March 31, 2002, Planning Assumption "Fostering Blended Learning In The Workplace."

[4] Organizations want the ability to seamlessly acquire talent; assess employee competencies and job performance; give employees learning experiences that will increase their job performance; and provide awards such as salary increases, promotions, recognition, etc. Technology to manage these processes has typically been siloed across the organization. Today, vendors like Cornerstone OnDemand, Plateau Systems,

Saba, and SumTotal Systems have developed performance management components, and vendors like Authoria and Vurv Technologies are considering providing the learning management component. Softscape provides all of these human capital management (HCM) components today, as do the human resource management systems (HRMSes) of Oracle and SAP. As the market evolves, learning and talent suites will mature as alternatives to both point solutions and comprehensive HRMS approaches. See the March 30, 2007, Trends "<u>Learning And Talent Management Join Forces</u>."

[5] LMSes continue to mature and provide greater depth in their ability to register, track, and report on all kinds of learning experiences. See the March 31, 2005, "<u>The Forrester Wave™: Enterprise Learning Management Suites, Q1 2005</u>."

[6] The convergence of learning and work launches a new era for supporting the needs of workers to learn while they work. While eLearning courses and classroom instruction will always have their place, today's workers often don't have the time to take formal courses composed of many lessons. See the March 24, 2006, Trends "<u>Contextual Learning Boosts Performance</u>."

[7] Today's learning environment is expanding rapidly because both new workers and the accelerated pace of business demand fresh approaches to knowledge access. New informal learning resources combine with traditional learning to create a learning environment that has relevant material delivered quickly — even via mobile devices — within the employee's work context. See the February 14, 2007, Trends "<u>Knowledge, Learning, And Work Unite!</u>"

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