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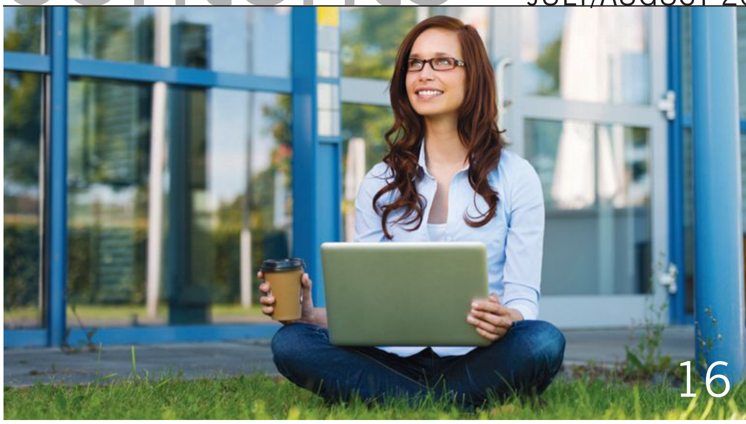
contents

JULY/AUGUST 2014 VOLUME 51, NUMBER 4



FEATURES

DEPARTMENTS

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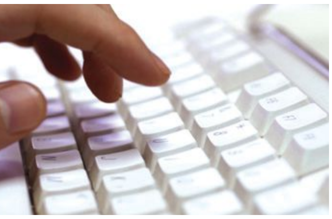

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Engaging Employees: The Good, The Bad, The Ugly, and The Remarkable

Understanding the four types of employees and ways to increase their level of engagement.
http://www.trainingmag.com/engaging-employees-good-bad-ugly-and-remarkable

Toxic Employees: To Confront or Not to Confront?

With a combination of good intentions, clear direction, and early detection, any organization can begin transforming toxic employees into positive contributors.
http://www.trainingmag.com/toxic-employees-confront-or-not-confront

Employees and Core Values: One Practice Each Day

The 31 Practices is a whole system methodology aligning the day-to-day behaviors of employees with core business values and purpose.
http://www.trainingmag.com/employees-and-core-values-one-practice-each-day

Employee Secondment: A Secret to Successful Integration

One often overlooked yet effective way to improve communication—both during the merger process and after closing the deal—is "secondment," which involves placing employees from a buyer's organization into the seller's, and vice versa.
http://www.trainingmag.com/employee-secondment-secret-successful-integration

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Thanks for the Measurements, Don

When I first joined *Training* magazine in 2007, my publisher gave me a stack of magazines to read and strongly suggested I familiarize myself with Kirkpatrick's Four Levels of Evaluation. Coming from a licensing publication, I had no idea what she was talking about.

But the first magazine I opened had an article that referenced those levels. And so did the next one. I quickly learned about Don Kirkpatrick, a.k.a, the Father of the Four Levels of Evaluation, who, in November 1959, revolutionized the way the impact of training programs is measured. Don Kirkpatrick had figured how to take training to the next level—and the level after that and the one after that.

The Kirkpatrick Four Levels of Evaluation had been part of the Training Top 125 application when I joined *Training*. At that time, the application was scored quantitatively only. After researching Don's work, I added qualitative scoring to the application, asking applicants to provide Level 3 and 4 results to prove the effectiveness of their training.

Sadly, Don Kirkpatrick passed away May 9, 2014, at the age of 90 after authoring eight books in training evaluation and Human Resource management topics; presenting worldwide for more than 50 years; and receiving numerous awards, including the ASTD Lifetime Achievement Award, ASTD Legend in Training and Development, ASTD Gordon M. Bliss Award, and *Training* magazine HRD Hall of Fame membership.

But his legacy lives on as his work is carried on by his son, Jim, and daughter-in-law, Wendy, through their company, Kirkpatrick Partners. In a May 21, 2014, blog post that was an open letter to his dad, Jim wrote: "Thanks for selflessly passing the torch for the Four Levels to Wendy and me. We will do our best to be the spark that turns others into bright lights. Thanks for teaching me how to laugh with people, and how to show them that heart and the human spirit are more meaningful than any metric."

Responses to a blog post by Kirkpatrick Partners posted May 12, 2014, included the following:

> "I have been applying Dr. Kirkpatrick's wisdom for 20-plus years; I think of Dr. Kirkpatrick as an industry mentor and, therefore, a personal mentor. Dr. Kirkpatrick's involvement in the performance improvement community and in other communities closer to home is a source of inspiration. He will be missed."—***Esther Bergman, Benchmark Performance***

> "The world will sorely miss someone so dedicated to the profession and ensuring that we are measuring at all four levels. His humor and his singing of the Packers or Wisconsin song all made him more human to the rest of us. Thanks for continuing his work, and may you all be blessed with his memories and legacy."—***Howard Prager***

Don's legacy continues in the 2015 Training Top 125 application, which was revised this year to place an even stronger emphasis on Level 3 and Level 4 results. Visit **http://trainingmag.com/learn-more-about-training-top-125** to download the application. I look forward to seeing how *you* are taking training to the next level.

Lorri

Lorri Freifeld
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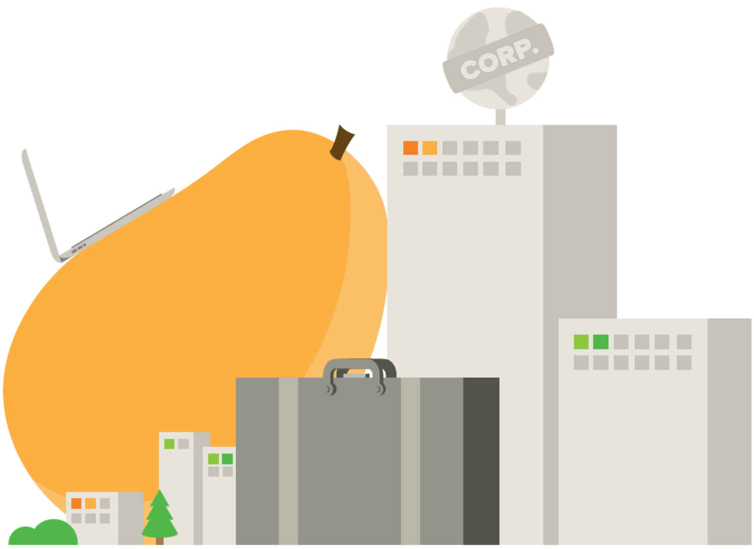

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Recognition Is a Good Investment

By Kimberly Abel, Vice President, Employee Solutions, Maritz Motivation Solutions (www.MaritzMotivation.com)

SAYING THANKS WORKS. We know this because when companies train their managers on ways to show employee appreciation, everything goes up—from retention to morale to customer service and productivity. But how can companies train on the skill of saying thanks for a job well done? There are three components to a training plan for effective workforce recognition:

1. Training on recognition concepts. First, it is essential to communicate why recognition is important and how effective showing appreciation can be when it comes to teambuilding, on-time deliverables, and overall performance. Studies show when employees experience genuine "applause" for their efforts, they will work harder because they know it matters.

2. Training on rules and guidelines for company recognition programs. Whether it's workshops or quick reference guides, training on programs that are available and the organizational policies such as budgets, how awards are grossed up for taxes, and types of rewards available will ensure programs are well understood, enjoy strong participation, and will be utilized correctly.

3. Training on how to use the tools and systems that support programs. More and more programs are moving online, are mobile, and increasingly are social. Some employees intuitively know how to use and access these tools, but others need online tutorials that show them how to use the available tools. Available on-demand training will ensure increased participation and utilization. Simply put, more people will use the recognition solution and use it properly.

This three-pronged approach to training for effective recognition will ensure that your leaders and front-line employees know why it is important, what programs are available, and how the tools work to use them. It takes time, but a comprehensive approach to training will ensure that your company gets the best return for its investment in recognizing all employees.

Productivity Coach's Corner

By Jason W. Womack, MEd, MA www.womackcompany.com
www.twitter.com/jasonwomack | Jason@WomackCompany.com

Strive for a Constant State of Improvement

The difference between productive leaders and regular folks is productive people are in a constant state of improvement of themselves, their systems, and their tools. They not only value their time, but they're able to anticipate the time savings of small, consistent improvements along the way. Productive people are coachable. They're hungry to learn from other people's experience, especially when it could reduce their time and effort in their personal learning curve.

Most other people slog through partially working systems and put up with slow and inconsistent ways of doing things. I watched one client delete hundreds of e-mails she had deleted the day before. Due to a glitch in the e-mail system, the e-mails kept being re-delivered. I stopped her after watching for a few minutes. We worked to track the process of fixing her e-mail system. It took more time than it would have to just delete the remaining messages, but it was an investment for her time and sanity to handle this reoccurring problem.

Consider your organizational system and how it supports you. Are there features you wish it did automatically such as synchronize, update, or back up? Have you ever checked e-mail on your phone, then decided you'd reply when you're back on your computer where it's easier to type back a long response? Do you ever say to yourself, "I'll figure that out when I have more time"? These are the red-flags that it's time to improve your system.

Invest your time in up-leveling your systems and see how much more energy you have for higher-level thinking.

TO SUBMIT NEWS, research, or other Training Today tidbits, contact Editor-in-Chief Lorri Freifeld at lorri@trainingmag.com or 516.524.3504.

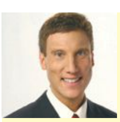
Building Olympic-Caliber Talent

By Sam Crumley, PeopleFirm

THE SOCHI OLYMPICS HELD the attention of the world, and many already are looking forward to the summer games in 2016. Why? The Olympics inspire us, with stories of hard-working and talented athletes—dynamic men and women dedicated to their chosen field. As leaders, many of us would give our eyeteeth to have a team of similarly motivated contributors.

Beyond their natural potential, Olympic athletes have an overall vision of what they can achieve. Their actions are connected to a much bigger purpose than the day's tasks: the gold medal. Help provide your top talent a clearly defined picture of what success looks like in your organization, and empower them to do more. High-performing athletes—and individuals—learn from experience, and that learning will create great things.

To develop high performers, create learning environments with real job responsibilities that demand constant growth and provide opportunities for them to prove themselves. Give them feedback and celebrate their wins. And make sure you both have a clear vision of where they are going and how they support your organization's strategic goals. They'll be more engaged and less likely to leave. And you'll have built the key players for delivering Olympic-caliber business results for your organization. Read the full article at: **http://www.trainingmag.com/how-build-olympic-caliber-talent-your-organization**



STICKY NOTES

The People List By Bruce Tulgan

www.rainmakerthinking.com | Twitter @brucetulgan | brucet@rainmakerthinking.com

Every employee is different. What works with one person may not work with another. What you need from one person may be very different from another. What one person needs from you may be very different, too. How can you keep track?

Try using a tool I call "The People List." This is a running list of all the key people with whom you need to be engaged in a one-on-one dialogue right now. Maybe it includes your boss or bosses, peers, and counterparts in other groups or departments, internally and externally. But first and foremost, your People List always should include your direct reports. Anybody who considers you his or her boss deserves a place on your People List.

Make the list. Who are all the key people with whom you need to be engaged in a one-on-one dialogue right now? Write (or type) the names in a vertical column on the far left side of the page. Next to each name, make a note: When and where was your last conversation with that person? Regarding what?

Now give that last conversation a grade for structure and substance. Would you give it an A+? B? C?

In the next column, to the right of your note next to each name, answer these questions for each person:

- What should you be talking about with this person?
- When and where are you going to have your next conversation?
- What do you need to do to prepare in advance?

Now you have a People List. Ask and answer those questions for yourself every day. Once you are in the habit, your People List will change. How you use it will evolve to meet your needs. But never stop asking and answering those questions.

Partnerships&Alliances

>> Sales performance company **Miller Heiman** and its two divisions, **Impact Learning Systems** and **Channel Enablers**, acquired **AchieveGlobal** and **Huthwaite** and consolidated the companies to form one organization: **MHI Global** based in Littleton, CO. The companies will operate independently and keep their individual company names, while being led by a cohesive senior-executive team.

>> Development Dimensions International (DDI) and **HireVue** formed a joint partnership that will provide employers with enhanced candidate interviewing solutions. Users now can utilize DDI's Targeted Selection systematic processes and skills for evaluating and integrating the candidate data gathered through the HireVue video interviewing system.

>> Vestrics and the **ROI Institute** announced plans to enter into a strategic alliance, with Vestrics offering its cloud-based workforce optimization software to ROI Institute practitioners.

>> Cengage Learning, a global educational content, technology, research, and services company, and **Matchpoint Careers** partnered to provide higher learning institutions with access to Matchpoint's Career Positioning System (CPS), an online, personalized career guidance tool.

>> As a result of a recent agreement, 33 videos from the **Center for Creative Leadership (CCL)** are now part of **EBSCO Information Services**' Leadership & Management Learning Center and Leadership & Management Video Collection.

>> Ernst & Young LLP has become a formal supporter of the **Enterprise Engagement Alliance** and will serve on the board overseeing the development and distribution of the Enterprise Engagement textbook and certification program.

Products&Services

>> Duarte, Inc., launched its new Persuasive Presentations e-course. Based on Duarte CEO Nancy Duarte's third book, the "HBR Guide to Persuasive Presentations," the new Duarte e-course is divided into three curricula: Storytelling, Visualizing, and Presenting.

>> Cornerstone OnDemand unveiled Cornerstone Marketplace, an online enterprise app center where users can discover, evaluate, and deploy 25 pre-packaged offerings ranging from video solutions to mobile learning and implementation consulting.

>> California Health & Longevity Institute (CHLI) located at Four Seasons Hotel Westlake Village just north of Los Angeles launched customized Leadership Training Programs. The institute offers two- to four-day science-based programming in stress management, communication, praise, mindfulness, emotional intelligence, nutrition, brain health, and fitness.

>> Sales Training And Results, Inc. (STAR) launched its Sales Meeting Kit product line, which helps sales managers lead a skills session at their regular sales meetings. The kits are subject specific and designed to be delivered in less than two hours, or can be split up into shorter sessions.

>> Crowdsourcing talent acquisition platform **RecruitiFi** is gamifying the recruiting industry. The recruiter who makes a successful placement receives the majority of the total commission. However, RecruitiFi also sets aside varying prizes of up to $250 for recruiters submitting qualified candidates who advance in the hiring process. Recruiters also accumulate points that can be redeemed for value-added features.

>> SAVO Group expanded its Sales Accelerator Series with the launch of Sales Onboarding Pro, a new application that provides training, coaching, content, messaging, and internal expert connections to help recently hired sales reps contribute earlier.

Cracking the Mentoring Code

By Chip Bell, author, "Managers as Mentors" (http://www.chipbell.com)

EFFECTIVE MENTORING SHOULD BE EASY. But there are four challenges with which mentors must reckon if they are to move from a "block-checking" activity to a growth-producing result.

1. Learning is a door opened only from the inside. That means mentors must find ways to be invited in. The authority feature of all mentors ("I have a competence you want but don't have") means mentors must level the learning field. Approaching the relationship as a partnership—two people jointly seeking an opportunity to explore—can help protégés lower their reluctance to trust.

2. Learning means taking risks in front of another. Mentoring happens under the watchful eye of a mentor. Since learning cannot effectively occur without risk-taking, it requires mentors to create an atmosphere of safety; this includes a non-judgmental manner and a style of sincere curiosity.

3. Learning is about insight and understanding, not information. Sustainable learning involves all manner of chemical changes inside the brain that only happen through fostering discovery. It is not opening protégés' heads to pour in information. Great mentors must facilitate, not instruct. Thought-provoking questions must trump smart statements; growth-producing feedback and advice must rule over wise lecturing.

4. Great mentoring is measured by the transfer of learning. Mentors must help protégés link what they learn to job application. It requires support beyond the mentoring relationship and transforming a cautious novice into a self-directed and joyful learner.

TechTalk

>> Adobe unveiled Adobe Experience Manager Communities for learning, a turnkey social and mobile learning solution enabling trainers to rapidly disseminate insights across enterprise and channel teams, facilitate knowledge exchange, and measure results. Adobe also launched Adobe Captivate 8, the latest version of its e-learning authoring tool. The software allows trainers and educators to author once and deliver multi-screen responsive content without programming.

>> WP Technologies Inc.'s wePresent WiPG is a new interactive presentation gateway that allows up to 64 users to present wirelessly from any device in full 1080p HD. wePresent is compatible with any operating system, and up to four devices can be displayed simultaneously on the screen.

>>Corporate Visions, Inc., introduced Power Launch, a new digital postcard tool that pushes mobile-ready content, including personalized e-learning videos containing new messaging demonstration and skills-sharpening tips, to sales reps' in-boxes.

>> eXplorance launched bluepulse, a social formative online assessment tool for learning. A real-time, free-flowing collaborative hub available for multiple learning management systems, bluepulse enables students and instructors to interact and enhance learning through improvement-based initiatives and continuous feedback.

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If "Culture" Is Key, How Can Training Help?

Learning is an irreplaceable component in defining an organization's culture to support the innovation, market adaptation, and employee engagement necessary for success. **BY ROSS TARTELL, PH.D.**

Ross Tartell, Ph.D., is currently adjunct associate professor of Psychology and Education at Columbia University. Dr. Tartell also consults in the areas of learning and development, talent planning, and organization development. He received his M.B.A. in Management and his Ph.D. in Social Psychology from Columbia University.

Culture is everything! Culture trumps strategy! The headlines about the impact of organizational culture on business performance are everywhere.

If culture is so important to organizational success in the marketplace, how can training help to shape a culture that enables employees and the organization to succeed in today's tumultuous market?

One of the better definitions of culture is outlined by Steve Paskoff, president of ELI, in his ebook, "Creating a Culture of Speaking Up": "Culture is a common pattern, set of practices, customs, and traditions that determine how people act, communicate, and order their lives. It's an unconscious roadmap used to determine how to handle problems and interact routinely. It's passed down to workplace generations from leaders and team members, and backed up by reward systems and 'punishments.'"

Ian Read, CEO of pharmaceutical giant Pfizer, notes, "Culture touches and influences every function in an organization, from research and development to manufacturing to sales. Get it right, and culture can transform your company's performance and help sustain success for years to come. Get it wrong, and you'll pay dearly for it…for years to come."

Research by John Kotter and James Heskett makes the financial argument. They conducted an 11-year study comparing the performance of 12 companies that had an adaptive culture with 20 companies that did not. Companies with adaptive cultures outperformed the competition by a tremendous margin:

Average increase for 12 firms **with performance-enhancing cultures**
Average increase for 20 firms **without performance-enhancing cultures**

Revenue Growth	683%	166%
Employment Growth	282%	36%
Stock Price Growth	901%	74%
Net Income Growth	756%	1%

Similarly Bersin and Associates reported the following business performance results in a 2010 study of high-impact learning cultures:

- **32 percent** are more likely to be first to market
- **37 percent** greater employee productivity
- **34 percent** better response to customer needs
- **26 percent** greater ability to deliver quality products
- **58 percent** more likely to have the skills to meet future demand
- **17 percent** more likely to be a market share leader

Bottom line? Companies with adaptive, performance-enhancing or high-impact learning cultures win in the marketplace.

A learning effort that is integrated into an organization's culture and strategy engages the hearts and minds of the employees. Companies with adaptive, performance-enhancing, or high-impact learning cultures win in the marketplace.

DEPLOYING LEARNING & DEVELOPMENT AT ALL LEVELS

People learn through a combination of three methodologies:

1. Informal, on-the-job, experience-based projects and practice
2. Coaching, mentoring, and developing through others
3. Formal learning interventions and structured courses

Aligning the content of these three approaches with the factors that create an empowering and adaptive culture will enable employees, at all levels, to understand expectations, operationalize vision and values, and develop an understanding of what is necessary to succeed.

LEVERAGE POINTS

Here are key leverage points where training can influence the alignment between culture and strategy:

- **Match strategy and culture:** Identify the cultural traits necessary to achieve the strategy. Then connect the traits to the vision, purpose, and values that are the context for every decision an employee makes.
- **Honor strengths of the existing culture:** Use the company's unique stories and ongoing narrative to link cultural strengths to the strategy and minimize the magnitude of a cultural shift.
- **Ensure that formal structures reinforce the desired culture:** Reward systems and other organizational structures shape the culture. Employees need to understand how the system works.
- **Measure, monitor and respond:** As Edward Deming said, "In God we trust; everyone else, bring data." Clear goals and metrics enable everyone to move in the same direction because people can operationalize what "it" looks like and will have the data to adjust.
- **People, people, people:** People require the knowledge, skills, and motivation to embrace and live the culture. As Patty McCord of Netflix eloquently said, "Hire, reward, and tolerate only fully formed adults." Candid, "adult" discussion to resolve the inevitable disagreements and misunderstandings is a core skill necessary for performance and understanding the realities of the market.
- **Model authentically:** Leaders must model the behaviors and values critical for success. Leadership directly shapes culture because employees watch a leader's every move in order to understand expectations.

LEARNING & DEVELOPMENT'S ROLE

My friend, Steve Paskoff, told the story of how a grandfather was teaching his grandson about life, respect, and ethics. A savvy user of technology, the grandfather was asked by Steve, "What 'apps' are you using?"

The response: "*I'm* the 'app.' That's my job."

The story speaks to how Learning & Development makes a difference by personalizing the knowledge and skills. It creates on-the-job, mentoring, and classroom experiences where people have the personal exposure and time for reflection necessary to learn how to be successful.

To have impact, Learning & Development must use all three training approaches with individuals, teams, and organizations to build employee understanding of how the strategy and culture work together. The result is a learning curriculum that provides consistency of message and linkage to the future.

CORE LEARNING INTERVENTIONS

These are a few examples of learning interventions that can reinforce the leverage points where culture and strategy intersect:

- **Create communities of leaders to define and operationalize the vision.** These communities often start as leader-led workshops. For example, during the merger of Genentech and Roche, they used a division-wide workshop to create dialogue and common understanding.
- **Create a corporate-sponsored curriculum.** As Pfizer CEO Read emphasized, "The company's culture is embodied most prominently by the employee's manager. So first- and second-line managers are the critical links in bringing a company's culture to life."
- **Develop leader-led training, at all levels, to help define expectations, values, and decisions** that link the current culture and strategy to the future. Leadership makes a significant difference.
- **Partner with Talent Acquisition to ensure that there is robust interview skills training** to support external hiring or internal transfer.

A learning effort that is integrated into an organization's culture and strategy has enormous power. It engages the hearts and minds of the employees, and enables them to understand how to create success. Learning is an irreplaceable component in defining an organization's culture to support the innovation, market adaptation, and employee engagement necessary for success in today's market. t

Enable Business Goals Through L&D

Six ways to accelerate performance and strategy with your L&D expertise. **BY LINDSAY DONAIRE**

Lindsay Donaire is a 2013 Top 5 Emerging Training Leader. She is also a native New Yorker who has spent more than half her career outside the United States and all of her professional life supporting talent decisions that generate business outcomes. She has almost exclusively associated herself with the colors red and white, first as a graduate of Cornell University's School of Industrial and Labor Relations, and then working with Campbell Soup, Levi Strauss & Co, and most recently Coca-Cola Enterprises as associate director of Learning & Development.

Seventy percent of senior executives say strengthening capabilities, such as leadership or operational excellence, is a Top 3 priority, according to a recent McKinsey survey. Yet the same survey reveals only one-third of the 1,600 respondents rate their L&D activities as effective at developing critical capabilities or driving business performance.

Facing this situation, what can a Learning & Development (L&D) leader do? This article shares my lessons learned leading and implementing a strategic learning plan across multiple territories within the fast-moving consumer goods industry. Here are six tried-and-tested techniques to identify, prioritize, and execute a strategic learning plan that accelerates performance and enables strategy.

1. REALIZE YOUR IMPORTANCE: Your ability as an L&D professional to understand the business and be a credible advisor is the most important lever to influence talent and business decisions. In doing so, the standard for L&D excellence is higher than it's ever been. The list of expectations includes traditional L&D excellence such as instructor-led training (ILT) and peer learning, technology-enabled learning such as social networks, and pulling those levers in sync with talent management to nurture a learning culture. Considering which elements of L&D have relative impact on the achievement of business goals, advisory firm Corporate Leadership Council's research revealed L&D staff capabilities (51 percent) was the most important factor, followed by L&D strategy (43 percent), L&D structure (5 percent), and L&D tools (1 percent).

This reinforces why my No. 1 is about you. You are using your business acumen to proactively expose the business plan's risks and opportunities, and influence both talent and business outcomes. Often, this is a different focus for both business leaders and HR business partners (BPs), who may be more comfortable thinking about and making decisions on capability for individuals, and not for organizations. In other words, it's a paradigm shift.

Helping your leaders shift their thinking about L&D relies on your skills "to facilitate and enable learning. L&D teams should build skills in performance consulting; gain expertise in new technologies, including social and mobile; and work to cultivate strong learning cultures within their organizations," according to research & advisory organization Bersin by Deloitte. Both Bersin and CLC research point to the same outcome—your ability to help leaders identify and prioritize capabilities increases alignment between what the business needs to demonstrate and what capabilities it invests in to make a difference.

2. EVALUATE RUN VS. GROW: When learning needs analysis first launched, there was limited visibility on whether formal learning activity was spent on capabilities essential to keep the lights on or activities that would differentiate performance in the marketplace. My team used the technique of categorizing formal learning in the portfolio as either running the business (such as foundational selling or presentation skills) or growing the business (such as creating customer business plans or executive leadership development). As it was the first time the organization was to formally consider the strategic impact of learning, L&D helped by drawing a line where 70 percent of the following year's activities and investment were dedicated to running the business and 30 percent to growing the business. Annual forecasts showing classes, timing of delivery, and total hours of formal learning provided HR business partners and leaders with a pragmatic view of their predicted training plan.

This saved time, reducing HR BPs' time to create their learning plan from 14 hours to an average of five hours. The time they did dedicate to the learning plan could be better spent on prioritizing the "grow" initiatives and assessing the balance of run vs. grow against their people and business plans. Besides formal mechanics, prioritizing learning needs in this way allowed for planning how to embed these organizational capabilities.

3. ANALYZE DEMAND VS. CONSUMPTION: Numbers talk. One business unit's historical data showed two years of over forecasting the quantity of learning it could consume. Quantifying the learning "demand" allowed a comparison of how much was asked for (demand) and how much was consumed (consumption). The last two years showed a business unit request on average of six days of training per learner. Consumption data showed 1.2 days. In response, I applied Michael Porter's advice—"the essence of strategy is choosing what *not* to do"—to learning plans. As a result, the business unit forecast L&D activity consistent with its historical trends; learners did not feel the company overpromised and under delivered; vendor agreements were better negotiated; time and investment were directed toward the most valued L&D activities; and line managers focused on a few, prioritized capabilities and guided their application to the job.

4. CONSIDER THE MECHANISM TO DELIVER PRIORITIZED LEARNING: As a sommelier would flex her knowledge about old world and new world wines to enhance a meal, consider the mix of learning delivery vehicles to make it as easy as possible to apply new skills to the job tasks. One organization I worked with had a learning portfolio that was 90 percent ILT and 10 percent online learning (OLT). While the split was high touch for learners, the investment of time and money limited flexibility. The foundation of the right architecture to leverage the flexibility of technology-enabled learning was critical to executing a more versatile learning delivery approach. This contributed to the implementation of a learning management system (LMS) as the foundation of learning delivery.

The target was to diversify the portfolio in two years to 60 percent ILT and 40 percent OLT. After 24 months, actual results were 40 percent ILT and 60 percent OLT. The diversification of learning delivery vehicles affected the learning plan in important ways. From an operational perspective, learning needs that used to appear in requests, such as Microsoft Office, were shifted online. For learners, this meant the individuals who needed MS Office capability would have 24/7 access. Within 12 months, learners had access to 1,000-plus online courses, resulting in a shift from content being "pushed" to a more intuitive approach where learners "pull" the information they need when they need it. Results of diversifying the delivery vehicle contributed to positive feedback in the organization's recent employee engagement survey, showing a +6 statistically significant improvement to the question, "There are sufficient learning opportunities for me to receive training to improve skills in my current job."

5. FOCUS ON LEADER-LED LEARNING: "When senior leaders set the training agenda, capability building more often is explicitly linked to immediate business goals than when other groups do so," according to McKinsey research. This translated into the implementation of several tactics, such as governance, learning design, and clarifying the role of the line manager. For example, the CEO hand-selected a cross-functional group of high-potential leaders who acted as a sounding board and sparring partner for the level of alignment the learning plan had to the company's vision and business plan. After two years of working with this cadre of leaders, one leader remarked on L&D's progress and an ambitious target: "It's not a question if we trust L&D to deliver. We see you make it happen and with a level of quality we never saw before at this company. The point now is that the speed of change at the business is so fast. I'm not expecting L&D to keep up—I'm expecting L&D to help the organization learn faster than the speed of change."

6. GO BEYOND THE CLASSROOM: When implementing a new approach to customer business planning, the Learning Design team broke up the course into eight complementary modules. In between each module was "homework" that was relevant to the customer, such as analyzing customer and consumer data to identify growth opportunities. As such, deployment was not perceived as additional work but rather as a way to improve the work that needed to be done in any case. Formal learning was established as a workshop, which started with the most senior commercial leaders in the country, followed by them co-facilitating with external experts for their account leaders. This shifted the role of external facilitators, as well as that of senior leaders themselves. This approach also implied a cross-functional effort, as the customer plan was not only a result of the account leaders but also the contribution of specialists such as insights and marketing. The pilot resulted in $276 million in incremental sales.

It is an example of what Bersin calls "organizational capability development." Bersin research validates that L&D organizations that implemented this type of learning delivered profit growth three times greater than competitors over a four-year period.

These six techniques have helped me, my L&D team, and my business leaders accelerate performance and enable strategy using L&D. What has worked for you? Share with me via LinkedIn at: **be.linkedin.com/in/ldonaire/.**

Make Sure Big Data Adds Up

The science of data collection is meaningless without the art of interpretation.

BY TIM TOTERHI

Tim Toterhi is an executive coach, speaker, and organizational development practitioner. He is the author of three books, including "Strategic Planning Unleashed." For more information, visit **www.timtoterhi.com.**

Big data is all the rage in Human Resources and Learning & Development departments these days. As business leaders demand more analytics from all disciplines within their organizations, professionals in roles as diverse as workforce planning and employee training clamor to crack the code on meaningful ROI metrics. While increased attention to quantitative inputs is a key component of demonstrating value, practitioners should be careful not to abandon the qualitative aspect of the equation.

THE VALUE OF DATA

When accurately defined, HR metrics can help enhance the way an organization hires, trains, rewards, deploys, and retains its employees. In addition to advancing these core employee lifecycle activities, thoughtfully designed measures can ensure targeted benefits from projects such as system implementations, culture change initiatives, and even post-merger integrations are captured according to plan.

In the training world, developing the right metrics early on can lead to demonstrating the real-world value of programs based on measurable advances in employee performance—a far cry from smiles sheets aimed at simply confirming participant satisfaction.

DATA DO'S AND DON'TS

While there are cases when executives want a cold read of the "as is" reality, most often they come with a working hypothesis of a situation. Regardless of the topic, it is important to begin by understanding the reason behind the initial request. Business leaders are not interested in data for data's sake. Most covet the story it allows them to tell. Understanding both the business case they want to validate and their personal motivations behind the project will help you maintain your objectivity. Other guidelines include:

- **Sweat the details:** Time-crunched leaders often will ask for ballpark estimates. Avoid the temptation to dazzle with speed at the expense of quality. Often, big-picture views are only possible after detailed analysis, so be sure to know the proverbial trees before you speak of the forest.
- **Include the caveats…but don't hide behind them:** Variables exist and should be accounted for, but be sure to take a stand on what should be done. Anyone can present statistics. Data, however, only becomes valuable when transformed through analysis into directional indicators and accompanying actions.
- **Strive for balance:** The science of data collection is meaningless without the art of interpretation. Even established quantitative measures, such as Total Cost of Workforce (TCoW) calculations, should be viewed through a complementary qualitative lens such as "TQoW—Total Quality of Workforce" to reveal actionable insights.
- **Mind the money:** Treat each project as if you were personally funding it. Having a sound business case is not enough. Acting like an owner requires you to think beyond your individual initiative and evaluate the opportunity cost, associated risks, and project interdependencies before taking action.

WHAT'S AT STAKE

As HR and Learning & Development professionals, we correctly call on leaders to manage their human resources with the same focus and care they do their financial resources—asserting, especially in services organizations, that there is a valid business case for increased attention to human capital management.

At the same time, we consistently clamor for a "seat at the table." Membership, however, requires that you have something meaningful to say. Arming yourself with data is a good start, but having the wherewithal to consult on strategies and actions related to that information is the real game changer.

There's no question that big data is a valuable tool for selecting a course of action. Sometimes, however, solving for X is harder than you think. To ensure your efforts add up to success, incorporate both art and science into your decision-making. No one blames data for a bad call or a missed opportunity. In the end, you have to own your decisions.

Focus on Finland

Training costs may be higher in Finland, but this is balanced by the low-risk environment and excellent growth potential. **BY DR. NEIL ORKIN**

Finland is well known for its strong social welfare system and advanced standard of living. The government provides free higher education, a comprehensive health-care system, lengthy vacations, and well-funded pensions to the Finn people. This system gives Finns a great sense of personal security and pride in their country.

Finland tops the charts on almost every possible country ranking. It is one of the most literate countries in the world and has one of the highest per capita incomes. It often ranks as the least corrupt and most transparent civilization in the world and has ranked as the most democratic country in the world. Women participate at all levels in Finnish society. The environment is respected and protected through the legal system. Known for its beautiful mountains, forests, and lakes, the Finnish landscape is breathtaking.

Finland is one of the easiest countries in the world to do business in. The Finnish government believes in legal protection for organizations. On a per capita basis, Finland may have the highest cell phone and Internet usage in the world. As a result, the Finnish people are technologically advanced, which can provide a great competitive advantage to companies that maintain a Finnish workforce.

The population of Finland is only approximately 5 million. The main language of Finland is Finnish, but English is widely spoken and taught in the schools. This serves as a major benefit to North American trainers, who do not need to translate their training materials.

Finland holds a strategic location in Europe. By having a presence here, your organization will have easy access to Russia, Eastern Europe, Lithuania, Estonia, and Latvia. These are all areas of the world with great growth potential for your organization. By virtue of its membership in the European Union, Finland has free trade opportunities throughout Europe. By doing business in Finland, your company will have access to a well-trained, professional, English-speaking workforce. This workforce has top computer skills, and is fully supported by the Finnish government. Finland wants to make it easy for your organization to do business here.

WHERE DOES TRAINING FIT IN?

Because of its small population, Finland needs to export products to truly grow its economy. There is awareness that workers require higher skills to compete in the global economy. Finnish companies can earn far higher profits selling finished goods as opposed to commodities. Training is needed to allow this change to occur. Your business will benefit from manufacturing products, and exporting them worldwide.

The Finnish government is well aware that continual training is required for its citizens to stay on the cutting edge of technology. Training is needed in topics as diverse as critical thinking, creative problem solving, quality (including Six Sigma), leadership, and advanced presentation skills.

The main locations for training are in the following major Finnish cities: Helsinki, Espoo, Tampere, Vantaa, Oulu, Turku, and Malmo. These programs often are held in hotel conference centers. Larger organizations often conduct training sessions onsite. Your training costs may be higher in Finland, but this is balanced by the low-risk environment and excellent growth potential.

TRAINING TIPS

Training in Finland can be different from training in North America. The Finnish people are very reserved and quiet, and they appreciate "silence." Other tips:

- Address your participants by their last name.
- Do not single anyone out for praise.
- Do not expect Finns to share information about their families during training. This type of information is considered private.
- Instructor-led training is the norm.
- Have clear ground rules as to the structure and schedule of the training.
- Using slides and providing participants with handouts can help them learn best. You may need to adjust the speed and delivery of your material until you are clear on participants' English comprehension as English most likely is not their first language.
- There is a good chance that your participants will not ask you many questions. This is a part of the Finnish culture, and needs to be respected.

Dr. Neil Orkin is president of Global Training Systems. His organization prepares corporate professionals for global business success. For more information, visit **www.globaltrainingsystems.com.**

Home Improvement?

Working from home can drive employee engagement and performance, but companies first must provide telecommuting training and reinforcement. **BY LORRI FREIFELD**

A year ago, Yahoo! CEO Marissa Mayer ignited a firestorm of controversy when she eliminated the company's telecommuting option. Best Buy and Hewlett Packard soon followed suit with their flexible work programs. While many employees feared this was the beginning of the end of flexible work arrangements, 89 percent of respondents to a PGi survey of 933 respondents reported their employer's telecommuting policy did not change during the last year. In other research, almost all 556 full-time employees (97 percent) surveyed reported having some form of work-life flexibility in 2013, according to a report from the Flex+Strategy Group | Work+Life Fit, Inc. (FSG/WLF).

That said, despite the availability of workplace flexibility, more than 4 in 10 full-time employees surveyed reported their employer's commitment to work-life flexibility may have waned in the last year, according to the FSG/WLF research. That is evidenced by the fact that a majority (57 percent) of employees did not receive training or guidance on how to manage work-life flexibility.

"We can't expect employees to effectively manage and leverage work-life flexibility when most receive no guidance or training. It's not enough to just offer the option or provide a laptop," notes Cali Yost, CEO and founder, FSG/WLF, who believes a telework policy is just one piece of a broader day-to-day and formal work flexibility strategy and culture change. "A strategy to maximize workplace flexibility should be as important to a business as a strategy to develop new products or identify new markets."

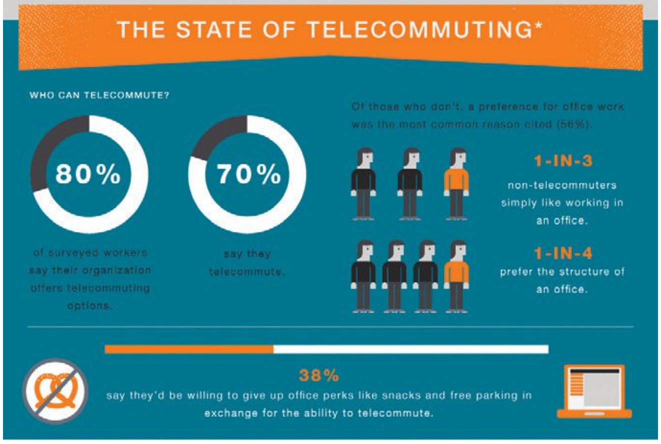
That means identifying how workplace flexibility can engage employees, implementing best practices for motivating telecommuters, providing training to both in- and out-of-office workers and their managers, and clearly communicating any policy changes and the reasons behind them.

Home Improvement?

DOES WORKPLACE FLEXIBILITY MOTIVATE?

Yes, Yost believes. "Flexibility increases employee engagement and motivation because it gives good performers the ability to fit work and life together in a way that allows them to be their best. However, the combination of flexibility in how, when, and where work is done that is most motivating will depend upon the person and the job."

Adds Rose Stanley, Total Rewards Practice leader for WorldatWork, "Telecommuting often has a positive effect on engagement when it's the right worker: The ideal teleworker is self-motivated, works well on his or her own, has clear direction and a supportive supervisor/manager, and all the things needed to complete the job are readily available in an alternative location. These are all the things that make a conducive work environment to help the worker do his or her job away from the traditional office."



Source: 2014 PGi Telecommuting Survey

The "culture of flexibility" within an organization can give a worker the additional boost of knowing that his or her organization not only offers this form of flexibility, but supports it, Stanley says, and that can be an important distinguisher. "Employees want to know they can have flexibility if they need it—and sometimes when they want it. Employers want the job done, and if they can have an engaged employee doing that job, they feel they're getting superior results," she notes. "But not every job, person, department, or company is right for telework. Most employers and employees like the idea of telework, but, in reality, it may not be an appropriate fit, and fit is critical to telework success for both the employer and the employee."

Aubrey Daniels, Ph.D., founder of workplace consultancy Aubrey Daniels International, has a slightly different take than Stanley and Yost. "The fact that employees work at home or in the office has little to do with engagement," he believes. "It is the management systems and management behaviors that determine engagement. If an employee wants to work at home, and has earned that privilege, engagement already should be at a high level for that particular employee or he or she will do no more at home than in the office. In fact, if the privilege is not earned, the employee will do less."

Dr. Daniels believes the privilege of working at home should be earned. "If a poorly performing employee complains he would work better at home because he won't be interrupted as he is in the office, don't be surprised if he is more of a problem at home. Use the privilege as positive reinforcement for good work in the office, but keep in mind that some employees would rather work in the office than at home."

In addition, Dr. Daniels says, feedback and reinforcement must be used effectively to engage employees. "Working remotely does present some obstacles for delivering feedback and reinforcement, but they can be provided when you understand behavior."

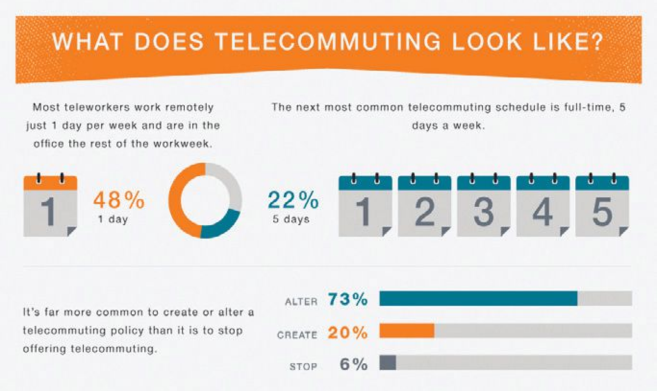
BEST PRACTICES TO MOTIVATE TELECOMMUTERS

While it may seem difficult to motivate employees who are not physically in the office and interacting in person with co-workers, that doesn't mean it's impossible. In addition to giving telecommuters challenging, meaningful work and recognition for a job well done, Yost says the three best tactics to engage and motivate telecommuters are:

1. Plan periodic on-site meetings where they can interact in-person with the rest of the team.
2. Incorporate video-based communication tools into the ways team members interact with each other.
3. Loop them into important, ad-hoc meetings and calls as often as possible.

Stanley notes that employees who work more often in a telecommuting arrangement risk the possibility of estrangement and lack of focus. "Dedicated and regular communication between employee and manager on an ongoing basis is crucial," she says. "And it's not just up to the employer to set up opportunities to connect; the telecommuter bears part of the responsibility to stay connected also. It's always wise to bring telecommuters in every few months to reconnect with co-workers and the organizational culture and provide them with face-time with co-workers. Getting them involved in cross-functional teams virtually can help build relationships, as well."

Dr. Daniels points to his three best practices to engage and motivate all employees—both in and out of office: reinforcement, reinforcement, and reinforcement. "This is not a facetious answer," he stresses. "Employees at home think those in the office are treated better than the telecommuting employees. Those in the office think the



Source: 2014 PGi Telecommuting Survey

telecommuting employees have it better. These perceptions come from the fact that neither group feels it gets enough positive reinforcement."

At Aubrey Daniels International, many employees work from home. "These employees understand the expectations for them and their work," Dr. Daniels says. "Those who manage them, as well as those who work with them, rely on the telecommuting employees to perform just as they would if they were in an office. In addition, for those who don't telecommute, there is an office policy allowing them flexibility to adjust their schedules when things come up. Whether it's leaving the office for a few hours to attend to a personal need or working from home when a family matter arises, we treat our employees with the respect they deserve. In return, our employees perform at their best, always."

TRAINING FOR TELECOMMUTERS

When training telecommuters (and any worker with any type of work flexibility) on working from home, Yost believes the emphasis should be on three key objectives:

1. How do you use work flexibility to deliberately and intentionally fit work and the other parts of your life together to be your best on and off the job, day-to-day, and at major life transitions (e.g., having a baby, caring for an aging relative, etc.)?
2. What are the expectations, or organizational "rules of the road," for flexible work success related to responsiveness, customer service, team collaboration, communication, and compensation/benefits?
3. How do you use the available technology effectively?

Yost recommends using a combination of live, in-person or Web-based training sessions to introduce skills and tools and to answer questions, then reinforcing those skills and tools with as-needed, on-demand, learner-directed e-learning.

"We see more success in organizations that train managers, telecommuters, and co-workers on some aspect of the teleworking policy, organizational culture, and senior management's views on this way of working," adds Stanley. "The goal is to make this new way of working as seamless as possible, and everyone needs to know how to communicate easily and effectively with one another."

Follow-up should be reinforced by and even observed through that "seamless" viewpoint, Stanley says. "You'll know when it's not working, and the training and continual use of such things helps maintain a smooth working environment."

IMPLEMENTING POLICY CHANGES

As time goes by and business needs change, organizations will need to tweak, revamp, or, in some cases, eliminate their

CLARITY AND COLLABORATION IN FLEXIBILITY TRAINING

By Shani Magosky, Vitesse Consulting, LLC

While flexwork has become more commonplace, the training of managers and employees for success remains rare. According to WorldatWork's October 2013 Survey on Workplace Flexibility:

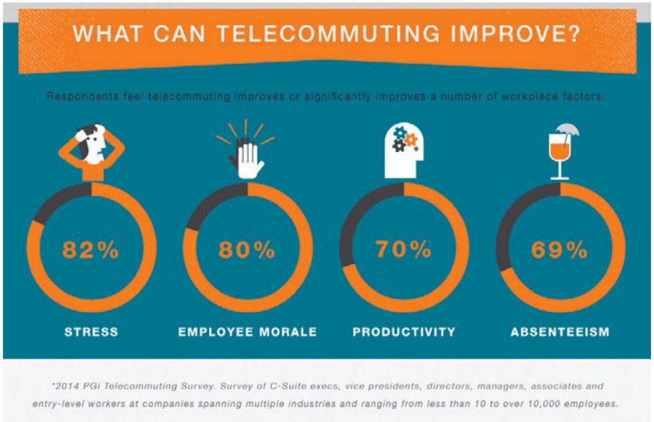
- 88 percent do not train employees to be successful with flexible work arrangements.
- 83 percent do not provide training to managers of employees using flexibility programs.

Few strategic initiatives are supported by such a low level of training commitment. We'd never consider asking someone to operate a complex new machine or sell an intricate new product without appropriate training, so why do we direct people to work from home without sufficient training to ensure success?

As a flexible workplace consultant who earned her stripes managing a highly distributed team from 2006 to 2011, I didn't have a "how-to" book on leading a virtual staff, and no one trained me on the subject. While thought leadership on the topic has become more prolific since then, there's still no silver bullet—managing people is challenging whether it's in person or thousands of miles away.

Having said that, I created "The 15 C's for Success for the Flexible Workplace" based upon what I learned to help other leaders navigate the complex waters of remote people management. The first five C's are strategic and the other 10 involve implementation. To heighten awareness of and encourage actions to correct the training gap, I'll focus on two of the tactical C's: COLLABORATION and CLARITY. From a training and development perspective, we need to see:

- PRACTICAL, HANDS-ON TRAINING on the cadre of tools selected to foster collaboration, encourage knowledge sharing, and enhance productivity: People are too busy and overwhelmed for "Field of Dreams 2014," i.e., if you build it, they will NOT necessarily come. We've seen too many companies squander their investment in potentially game-changing apps such as Yammer, Lync, Asana, or Basecamp because they launched without proper training, support, and context.
- TRAINING FOR MANAGERS on how to coach employees to greater performance: I'm talking about the kind of coaching that involves regularly engaging in collaborative, solutions-oriented dialogue with your people instead of simply directing them what to do at every turn. Nothing engages and motivates employees—in the flesh or virtual ones—more than empowering them to find their own solutions and rise to bigger challenges.
- CLARITY ACROSS ALL LEVELS of the organization about the flexwork program: Clear communication and old-school standard operating procedures training are key to avoid inconsistencies, confusion, and widespread dissatisfaction.
- CLARITY AROUND DUTIES, deadlines, consequences of underperformance, and progress-reporting mechanisms: This is a competency managers and individual contributors alike frequently lack. We are all in such a hurry to get to the proverbial destination that we rarely slow down to communicate and receive training about landmarks to look out for along the way. It's impossible to be accountable or to hold others accountable if the targets aren't clearly defined at the outset. As Ben Franklin said, "An investment in knowledge always pays the best interest.



Source: 2014 PGi Telecommuting Survey

workplace flexibility policies. If done right, that should not provoke a critical backlash like Yahoo! experienced.

"In our research, 68 percent of full-time U.S. workers said that without work-life flexibility, employee loyalty and morale are affected," Yost says. "That is why companies need to first determine if they can fix or improve an underperforming flexibility strategy before completely rescinding it. Sometimes policies and procedures need to be improved, but think twice before you throw the flexibility baby out with the bath water. Unfortunately, more organizations don't know how to do that. It's easier to say, "Forget it."

When it comes to changing any type of flexible workplace strategy, honesty is always the best policy, says Stanley. "Communicating the reason for the change and helping employees understand why the business now is going this new route is key. Also, if a company has decided to eliminate a telework program, it should consider whether or not there are there other forms of flexibility employees may be able to utilize in specific situations to still balance work-life responsibilities."

Dr. Daniels recommends inviting employees to contribute to the details of the new policy. "Ask questions about what worked and didn't work with the old policy, and what employees think they need to work effectively," he says.

Yost agrees. She advocates involving as many people from as many levels and areas in the development process as possible. "If a particular group already supports and allows telecommuting, learn more about the underlying business case, what the roles and responsibilities of the manager and employees are," she says. "Then take what you learn and use that as the basis of the telework process and policy, or 'rules of the road,' that you then will pilot and scale."

Yost says the biggest mistake employers make is writing a top-down, one-size-fits-all telework policy, handing people a laptop, and essentially saying, "Good luck." Utilization is limited, Yost says, "as managers are leery and roles and responsibilities for effective implementation are unclear. That's a recipe for trouble." t

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Once Upon A Time In Training

Employees not grasping your trainers' lessons? The content may need a kick-start from storytelling. Illustrative anecdotes go a long way to helping learners get the point. **BY MARGERY WEINSTEIN**

Understanding principles in an employee handbook or an e-learning program can be difficult, but not because the content is hard. It's difficult because it's just so boring and detached from employees' day-to-day lives. Some companies are finding storytelling can bring to life learning content that now exists only on the page or screen. Others use it to recognize employees, to communicate the company's values and initiatives to employees and customers, or to develop emerging leaders. To make storytelling an integral part of your corporate culture, you first must guide trainers and managers to weave a tale that achieves its learning goals.

LEADERS TELLING (TRUTHFUL) STORIES

Sprint uses storytelling to train its next generation of leaders, says Wendy Savlin, manager, Leadership Development, Sprint. As part of a leadership development program in 2013, 150 Sprint leaders spent one full day learning about and practicing storytelling in small groups. Participants in this leadership program since have been able to put the lessons on storytelling to use with clients. When 50 executives attended the company's recent Executive Leadership Program, which targets high-potential executives, Sprint partnered with Duke CE to offer innovative training on storytelling using actors to teach important skills. "One participant used storytelling more frequently with his team and reported higher satisfaction and less turnover," says Savlin. "He also added storytelling to his public speeches and believes his stories helped get his message across more effectively. He has been invited to speak at conferences worldwide and credits the storytelling as a big reason."

Another Sprint executive who attended the Executive Leadership Program had an unhappy client. "After attending the program and learning about storytelling, he called his team together and challenged them to create a story of success," says Savlin. "They had some seemingly impossible happy endings. By starting with the story, the team was able to take their problem solving to a new level and implement one of those difficult solutions. Instead of losing an unhappy customer, the storytelling team created a surprised and happy customer."

On a larger scale, Sprint uses storytelling as a way

to share a positive corporate culture. "At Sprint, we use storytelling to help employees feel a sense of community with one another. Whether it is sharing the story about an employee who is a professional female football player or a health and well-being success story, we look for opportunities that allow employees to share their story with their Sprint colleagues across the country," says Jennifer Schuler, manager, Communications. "These employees often get a lot of positive response directly from employees near and far, and at the same time, it helps create cultural bonds for employees who are located many miles away from one another and may perform very different functions for the company."

IT'S "EMOTIONAL TRANSPORTATION"

"Storytelling is important because stories are emotional transportation," says Diana Oreck, vice president, Leadership Center, The Ritz-Carlton Hotel Company. "It is a fantastic way to make an emotional connection with employees. Storytelling captures peoples' imagination because stories add color to the facts."

Stories often are remembered more often and more accurately than straight facts, Oreck notes. "At The Ritz-Carlton, we have a process we call The Daily Line-Up. This is how 40,000 ladies and gentlemen (staff members) around the world align back to The Ritz-Carlton culture 365 days a year. On Mondays and Fridays, we share 'WOW' stories. These stories recount random acts of kindness by our ladies and gentlemen around the world. They are meant to inspire and motivate other employees to emulate kindness, and they do! You cannot teach discretionary effort in a classroom."

Oreck says storytelling in training works best if it is participatory, rather than presented solely by the trainer or facilitator. "The manager should tell his or her story first and then say: "It would be very meaningful if someone else would share a story of their own,'" she suggests. Oreck also says it helps to know your audience. "If you have an inkling that you might offend anyone, do not go there because stories can backfire. If your topic could be controversial and is edgy, practice on people first," she says.

With those precautions in mind, Oreck says you can weave in popular media to aid your storytelling. "We try and use movie clips or YouTube videos whenever possible to highlight a point. If you can make people laugh or cry through stories, you will effectively get your point across and the learning objective will be remembered," she says.

Every high-performing organization should have its own "WOW" stories of kindness and stellar service shown to customers or clients. Make use of these stories by passing them along, advises Oreck. "Companies that do not have a formalized mechanism to capture the random acts of kindness of their employees should think about implementing one," she says. "One of the most effective ways to further engage employees is to recount a positive story about them in front of their peers. That type of recognition is a wonderful psychological pick-me-up."

Companies that could use help getting started in storytelling can get it from Ritz-Carlton this year. This summer, the company's Leadership Center, which is open to the public, is asking for its clients' success stories. "We are asking our clients to submit a customer service WOW story from their company once a month," says Oreck. "We will vote on the story, and if the client agrees, it will be featured on our Gold Minds blog."

HIGH-TECH ANTHROPOLOGY

At some companies, such as custom software developer Menlo Innovations, storytelling isn't just a training device or tool—it's endemic to the culture. The company's storytelling is so ingrained in its culture that one of the co-founders, Richard Sheridan, is not just the "CEO" but also the "Chief Storyteller." Sheridan says employees should be skilled not only in passing along the company's overall story, but their individual stories to customers or clients. "The best way to build storytelling capacity and take advantage of the positive benefits of a storytelling culture, is not only to teach the team to speak the company stories in the voice of the Chief Storyteller, but to capture their own voice," says Sheridan. "This builds authentic leadership capacity as a person's voice gives insight into the character and the heart of the storyteller. It's magical. I delight in hearing Menlonians tell my stories in their voice from their perspective. None of the stories we tell—including mine—are 100 percent accurate as they are told from our own vantage point. By hearing the same story from different vantage points, we get a truer picture of our shared belief system."

Menlo even uses the art of storytelling to help it educate new customers about what the company could do for them. "Given what we do for a living—designing and developing custom software systems—story collecting and storytelling is an integral part of the practice we call High-Tech Anthropology. Menlo's High-Tech Anthropologists' work is to collect stories about the potential users of the software we are designing and retell these stories to our customers," says Sheridan. "Unlike the boring, templated documents and mind-numbing PowerPoints used by typical analyst teams, our High-Tech Anthropology storytelling events during client Show & Tells draw the client's minds and hearts into our work. The conversations that result are richer and more passionate, and, ultimately, produce better value in a more compelling and useful design that everyone believes in."

STORYTELLING VIA VIDEO

Hildebrand Creative has found storytelling videos to be an effective way to help clients communicate corporate initiatives to its various departments, says company founder Dennis Hildebrand. "JP Morgan was building a new mortgage center in California to support its efforts to build its mortgage business. We spent two days in the Illinois mortgage center and produced 10 videos, one for each of the 10 departments that touches a JP Morgan mortgage," says Hildebrand. "Each video interviewed those in each department to build a story on what the department does for the mortgage process and how each department is critical to a positive and successful client experience."

Hildebrand points to another example in which Illinois State University needed better insight into the minds and daily workings of angel investors for its entrepreneurial students enrolled in the university's Means Center for Entrepreneurial Studies. Hildebrand Creative interviewed three Chicago-based angel investors on three primary areas to start the video program: The Approach, The Presentation, and The Relationship. The success of the series has generated interest in building out the video storytelling series into an ongoing program for the center, Hildebrand says.

In addition, new managers can be brought more in touch with the meaning behind their new jobs through storytelling videos, Hildebrand believes. "Our best success with using storytelling in manager training involved a two-year contract with HP's Corporate Social Responsibility (CSR) department. We were involved in remote training managers from around the world via online training and conference calls on how to develop and build their own stories of how they, as HP employees, were contributing around the globe for social good. After training the managers to gather and construct their own assets and write and record

QUICK TIPS

- **Create more happy endings by telling positive customer or client service stories at leadership development events.**
- **The manager or facilitator of a training event can get the ball rolling with a story, but be sure to train them to ask learners for their own related stories.**
- **Capture your best customer or client satisfaction stories on video and upload to YouTube, Vimeo, or an intranet site for the benefit of employee training, and to gain the interest of prospective customers.**
- **Use a great story about the purpose of your company to create employee buy-in to internal initiatives such as corporate social responsibility programs.**
- **Remember, storytelling is a teachable art. Even your least creative managers can be taught how to use stories to reach employees and customers.**

their own scripts, all assets were uploaded to an online project management system, and we virtually produced their video storytelling series that played internally within HP to promote the company's CSR efforts around the globe."

Hildebrand says such videos then can be uploaded to sites such as YouTube and Vimeo for greater use. "Stories of real people throughout the organization can be shared instantly throughout the company, and used effectively in management presentations inside and outside the organization."

STORYTELLING: A TEACHABLE ART

If your company's managers don't seem creative, there is still hope that you will be able to nurture them into storytellers. It comes naturally to some, but many others who become proficient storytellers have to work at it. "Storytelling may not come easily to everyone. Some will need to work harder at it than others, but everyone has the capability and capacity to be a good storyteller," says Melissa Starinsky, chancellor of the Veterans Affairs Acquisition Academy. "Passion, patience, creativity, personal disclosure, humor, theatrics, spontaneity, and relevance/context are often critical elements of storytelling."

Learning to share both good and bad experiences without fear of being judged is a good first step for those for whom storytelling doesn't come naturally, Starinsky says. "Managers and employees who feel they are able to freely share without retribution or being judged are more likely to be honest so the richness of the learning experience can be optimized. While we all must and should be held accountable, it is critical that managers, leaders, and all employees show respect toward one another and *never* use the exposed vulnerability to harm another. Doing so will halt any kind of disciplined and deliberate storytelling effort from ever getting any traction," she notes.

Part of the trick, Starinsky says, is learning how to generate discussion of others' stories, so the manager isn't alone in the storytelling process. People generally want the opportunity to share, so managers should create an environment where this is possible. "In meetings, the manager can ask, 'Does anyone have a similar story they'd like to share or has anything like this ever happened to any of you?' A manager also could pose the question along the lines of: 'I'm really struggling with how to deal with this issue. Does anyone have any prior experience on something similar to this that you successfully navigated that you could share?'" she suggests. "Recalling the element of interactivity to effective storytelling, the manager and employees should participate by asking probing questions to better understand context and promote a healthy dialogue."

FROM SHY TO STORYTELLER

By Michael D. Maginn, Managing Partner, Singularity Group, Inc.

Imagine a team meeting where a facilitator asks customer service reps to tell a two-minute story about an incident where they felt personal satisfaction about helping a customer. The goal is to share effective relationship skills. Of the team members who volunteer their stories, many are caught up in the emotion or humor of their own tales, clearly enjoying their moment. But one or two are reluctant to contribute, and, when pressed by the facilitator, they tell stories that are stilted, unclear, and awkward. They retreat into silence for the rest of the meeting's agenda. What happened?

Shy people don't feel comfortable when attention is on them. They can be afraid of being judged by others or embarrassed by what they say or do in a social setting. Yet, as part of a team, their ideas and perspectives are valuable and should be included. How can shy people contribute their stories to the group without feeling pressure or anxiety? Here are a few tips for facilitators:

- SET THE STAGE: Explain why stories—because of their imagery, detail, and emotion—are useful in implanting memorable lessons, inspiring change, and creating connections between people. Demonstrate by telling a short classic or two such as "The Blind Men and the Elephant" or "The Zen Master and the Cup of Tea." Google these titles for examples.
- KEEP THE TONE COMFORTABLE: Explain the ground rules—no one is being judged; it's not a contest; the overall goal is to learn from each other; it's important to share what you are comfortable with. The feeling in the room should be light, fun, and upbeat.
- MAKE IT EASY TO CONTRIBUTE: Get participation going by some light-hearted easing into speaking aloud in a group. Ask participants to give you a one-word description of the first thing that comes to mind when they think of…peanut butter, flat tires, bowties, kittens…something a little silly and non-business. Call it a sound check; have fun with the responses.
- SAFETY IN STRUCTURE: Provide a framework for the story, give an example, and ask everyone to use it. A storytelling structure can be as simple as three steps:

1. Set up the situation; who is doing what and where.
2. Explain what happened or went wrong and what you did.
3. Describe what you learned. There are other story structures you can invent or find, but keep it simple and uncluttered.

- FIRST WRITE, THEN READ: Shy people might be reluctant to speak in front of people, but generally they are not shy about writing. So ask everyone to spend a short time writing an outline, some phrases, or sentences to fill in the structure. Provide a worksheet with the story structure. People will feel more comfortable reading aloud what they've written.
- SMALL GROUP, BIG GROUP: Telling a story to a partner or in a trio group might be less threatening than a larger group. After participants exchange stories in the relative safety of a small group, ask each group to nominate the best story it heard or to summarize the lessons learned.

Finally, and most important, recognize when shy people make a contribution. During a break or in a quiet moment, privately thank them for their story. After all, they went into uncomfortable territory to help the team.

Paths to Success: RESPONSIBILITY vs. PROMOTION

Companies are striking a balance between additional responsibility and promotion to ensure employees have the growth plans that suit them best—and encourage them to stay. **BY MARGERY WEINSTEIN**

When an employee is first hired, nearly everything about the job can be challenging and exciting—it's all new territory. But after as little as a year or two, your managers may notice the employee doing the job by rote and having a lot of extra time on his or her hands. Depending on your philosophy, this point in the employee's career with your company is the perfect time to offer a promotion with additional responsibilities. Or you may feel it is at this point that the employee simply needs to be given more responsibilities to spur continued learning—particularly if a spot at the next level is not open.

The decision isn't as easy as you may think. With payrolls still tight at many companies, the option of assigning additional responsibility to an employee who appears to have mastered his or her initial responsibilities may seem the best option. But the employee may become demoralized and resentful about the added workload without recognition of a job well done and at least a small salary increase. On the other hand, offering a promotion may encourage the employee to rest on his or her laurels and become complacent. Companies are finding that a mix of these two paths to learning is best, with that mix varying depending on the organization's culture.

UNDERSTAND EMPLOYEE NEEDS

No two employees are the same when it comes to what drives learning, so the first step to determining which path would be best is getting to know them. "What's motivating to one employee might be de-motivating to another. If you know your employees well, you'll be better able to select an assignment," says Kathy Jones, director of Employee Development, Baylor Scott & White Health.

Jones recommends having a career development discussion with each employee each year, apart from the annual review. "Ask them what they'd like to learn. This will give you insight into their motivation, and also will send the message to them that you expect everyone to learn," she says. For example, Jones says an employee who wants to learn how to influence peers could be given the opportunity to observe an influential leader in your organization. When giving an employee this kind of assignment, Jones says it is important to encourage employees to think about what they are experiencing. "Ask them what they observed, and help them figure out a way to try out those tactics in a safe way. Then give them the expectation that they need to apply those learnings on the job. Maybe they have a pet project they always wanted to implement. This could be a way for them to influence their peers."

Similarly, Jones says, an employee who wants to become a manager could shadow his manager when she does certain management tasks, and then gradually have the manager give him responsibility for a particular piece of that task.

When employees are promoted at Baylor Scott & White Health, the organization has a program that ensures they don't become complacent. "We require our new-to-role leaders to take a two-day foundational leadership course. The first four hours are all about transitioning to their new role. We share a study of best practices for leadership transitions and ask them to make a list of all the tasks they will stop doing and start doing as a result of their new role," says Jones. "This helps them stop doing the core work they did as an individual contributor. Six months after they are in their new leadership role, they participate in an assessment of their leadership competencies and create an Individual Development Plan. Our goal-setting process is part of our annual performance review, so the goals they are held accountable to as a leader are different from the goals they had as an individual contributor."

NOTE SIGNS EMPLOYEES CRAVE GREATER CHALLENGES

Part of understanding each employee's individual needs is knowing when he or she is trying to tell you something. "Some of the signs that employees are ready for more include they are finishing assignments quickly (and accurately), they seem to be bored, they are asking for more, or others are asking them for help," says David B. McLaughlin, M.Ed, SPHR, training manager, American Fidelity Assurance Company. "Whether you give them a promotion may be a question of whether or not you have the ability. If you have low turnover, you may not have a position to promote them to. They may need to go to another area of the company to learn a different part of the business or you may be forced into simply increasing their responsibilities."

CONSIDER THE NEED TO RETAIN THEM

One of the challenges of setting a growth path for an employee that balances increased responsibility with promotion is that many employees won't stick around if they are not given a promotion and pay increase within a reasonable time frame. For Generation X employees and particularly Millennials, who often differ from older generations in the speed at which they expect promotions and advancements, that time frame may be shorter than you think.

Ed Grabowski, manager, Talent Development N.A., at Minacs, tells the story of a high-performing employee who was given satisfying growth opportunities, but not a promotion, and eventually moved on. "I had a direct report who was highly motivated to lead projects that were visible to our client. Compensation and title were also motivators for her. I will

MASTERS OF THE MATRIX

By Audrey Smith, Ph.D., Senior Vice President, and Ellis Hall, Executive Consultant, Executive Solutions Group, Development Dimensions International (DDI)

Throughout our lives, we've been primed to follow a clear chain of command. So it's no wonder that, for most of us, a matrix-based business organization feels, well…alien.

As they move up the ladder, leaders in matrixed-based organizations face more complex challenges, including accountability to multiple people, the need to influence others across sectors or regions (often with little authority to fall back on), and getting the most from shared resources…not to mention the complexity that comes with virtual work teams, global locations, and multiple languages.

Research by DDI and others suggests that those who overcome the challenges of the matrix are pros at three skills:

1. NETWORKING. Masters of the matrix are experts at looking across the organizational chart and understanding the people and departments that currently relate, or are likely to relate in the future, to their job.

They expand their contact database to include central connectors (leaders, "old-timers," political players…people who have many of their own connections), boundary-crossing connectors (high-leverage people who cross silos, geographies, and hierarchies), and peripheral players (niche experts, disconnected contributors, cultural misfits—people who can provide unique views and insights).

2. PARTNERING. Similar to building a network, building a beneficial partnership requires time, trust, and a commitment to being a good partner in return.

Becoming a more valued partner requires an ability to think expansively. Good partners go beyond the confines of their own experience, knowledge, role, geography, and function. They also see beyond the organization into the marketplace to identify shifts, trends, and challenges.

3. INFLUENCING. To successfully persuade key stakeholders to take action, influencers understand it's important to position their personal agendas while also considering shared goals. And by leveraging their networks and doing their homework, they know how to appeal to their partners' heads, as well as their hearts. They understand how to build a logical case grounded in an understanding of the issues and show how it links to business strategy.

Leaders of all levels can—and will—realize success navigating the matrix by remembering that, for as alien as it may seem, the matrix, at its core, is human. The best news: The skills described above *can* be developed!

refer to her as Beth. She was truly a high performer, but I was not able to give her a new title or an increase in pay. However, I ensured that Beth was in front of projects that were client facing. This sustained her for quite a while. She truly felt like a key contributor to our client's success," relates Grabowski. "But even though Beth felt fulfilled with the work she was doing, she eventually realized she could provide the same positive impact at another organization, as well as receive an increase in pay. In addition to truly understanding what motivates employees, it is important for an organization to understand the time threshold relevant to each employee."

Putting the added responsibility in context with future possibilities for the employee is important. "You must set the tone for what the additional responsibility means for their future development. It's important to be clear about what the expectations will mean for them in the future," says Stacy Henry, former director, Learning, North American Operations, Iron Mountain. "Sometimes it's necessary for employees to take on additional responsibilities to prepare them for a promotion. It's also an opportunity for the business to assess whether or not they are, indeed, the right fit for a role, while giving them an opportunity to determine if it is best for them, as well."

To avoid the employee getting overwhelmed or demoralized by the new responsibilities, Henry recommends offering structured guidance. "The expectation has to be set by their immediate supervisor as to what their responsibilities will be. Put together a 30-, 60-, and 90-day plan," she advises. "Have weekly check-ins to ensure that expectations are met and employees have a clear understanding of their new role."

OFFER STRETCH ASSIGNMENTS

A compromise between simply adding responsibility and giving a promotion is to offer a stretch assignment. The employee may be offered a promotion if he or she performs well on the assignment. "Stretch assignments are a great way of testing an employee's readiness for additional responsibilities and challenges. These added responsibilities provide employees a 'safe space' in which to grow their knowledge, skills, and abilities (KSAs) without a fear of negative consequences if things don't go perfectly," says Anne-Marie Fort, senior consultant, BPI group. Fort says it's up to your organization whether you are open with employees and let them know they are being tested or given a trial run with the stretch assignment. "On one hand, it can be motivating for the employee when his or her manager acknowledges the employee's potential. On the other hand, some employees may demonstrate behaviors above and beyond their normal tendencies, painting a false sense of their abilities and intentions. This is why having a consistent understanding of the employee's performance and potential is important prior to increasing responsibility."

Leah Minthorn, acting director of Learning for North American Operations at Iron Mountain, says her manager was up front about the test she was being given. "My manager was clear as to what would be expected of me and what the intentions were for getting me to that next level; the kind of support I could expect, etc. It was made clear to me that I was not just 'getting the role,' that I essentially had to earn it, and that this was my test," she says. "I'm comfortable with this approach as I was told up front what to expect. I knew that the job was being posted. I knew that my interview was taking place on the job."

Letting employees know they are being tested for a possible promotion only works with the right corporate culture, says American Fidelity's McLaughlin. "If you are going to be up front with them about it being a test, then you need to be the type of person and have the type of organizational culture that is able to have difficult conversations about performance and development," he says.

Fort says after a stretch assignment is complete, employees should debrief the experience with their high-potentials group, or another employee group.

THE LEADERSHIP TEST

By Kent Sipes, Training, Communications, and Change Management Consultant, Io Consulting

I spent a few days in Hyderabad, India, last year, teaching effective communications to an offshore staff. Their office is growing so quickly that more leaders are regularly needed as the office reinvents itself. Rather than hiring experienced outsiders for most of these positions, the manager prefers to "grow his own" by sometimes adding to the staff for whom a leader is responsible, and at other times adding to the areas for which that leader is responsible.

In fact, the growth often outpaces the ability of the leadership structure to flex, and promotions sometimes lag behind increased responsibilities. In this way, the increased responsibilities become a low-risk "tryout" for the leader. A temporary position as leader of a special task force allows the staff member and the organization to evaluate how good a fit he or she is for a more permanent role change.

The budding leader gets a chance to see how a changed relationship to co-workers plays out, whether the new role adds more excitement and interest (or only stress), and what the day-to-day responsibilities of the new role really are. The organization gets a chance to assess whether the candidate manages his or her changed relationships effectively, is able to think outside the constraints of his or her usual position, and how increased power/responsibility affects his or her attitude.

If the "tryout" is successful (for both sides), the employee can be permanently moved into a leadership role; if not, both parties have gained understanding from the experience, and the employee may be more effectively placed in future assignments. The organization also may gain a better idea of what sort of employee is likely to succeed in that role.

If such an arrangement is not used unfairly or excessively (management dangling the possibility of advancement in front of employees just to get more short-term work from them for no added cost), it can be of great benefit to individual employees—and to the organization.

It will help employees to reflect on the experience and will give others who soon may be given stretch assignments an idea of what to expect. "It's a great development opportunity for employees to share the lessons they learn from their experiences with expanded responsibilities," she says. "Having those employees speak to a high-potentials program, write a white paper, etc., not only helps them reflect on the experience—which is often where true learning occurs—but also gives others the opportunity to learn from their lessons."

KEEP IT CONSISTENT

To ensure employees participating in stretch assignments and other growth opportunities feel treated fairly, create consistent job categories, roles, and corresponding pay, recommends Nancy J. Lewis, former chief learning officer at ITT Corporation, and before that, vice president of Learning and Leadership Development at IBM. "All roles in an organization should be categorized and leveled by scope, scale, level of expertise required, and potential impact on the company's bottom line. When this is done, you will find that you can have management and individual contributors in the same level of responsibility because their impact on the company is the same, regardless of whether they manage people or not. This also provides the organization a way to equitably level roles cross functionally," she says. At the same time, notes Lewis, the company's culture should teach employees the need to be adaptable. "I think most people understand that to keep pace with the needs of our growing and changing businesses, all our roles will change constantly and expand in responsibility. They also will require us to gain new skills and expertise." t

QUICK TIPS

- Train managers to create Individual Development Plans for each employee, including a discussion of what most motivates them and their desired career path at the company.
- Managers should speak one-on-one enough with employees to note when they seem to be getting bored with their jobs and are seeking a challenge.
- Not all employees will stand for being given added responsibility with no discussed plan for an eventual pay increase and promotion. Consider offering the plan of an eventual reward to employees who are keepers.
- Offer a stretch assignment that tests employees in a role with added responsibility. This way, you get to see how employees will perform before giving them the increased salary, and the employees also will get a chance to see if the new role is right for them.
- Setting growth plans of added responsibility and possible promotion becomes easier when you create consistent job role categories and corresponding pay grades. That way, employees understand what is expected of them in each role and whether they can expect a pay increase and promotion when moving into a new role.

10 PERFORMANCE MANAGEMENT PROCESS GAPS

And how they negatively impact employee intentions.

BY DREA ZIGARMI, DOBIE HOUSON, JIM DIEHL, AND DAVID WITT

Performance planning, coaching, and review are the foundation of any well-designed performance management system, but the results of a recent study suggest that leaders are falling short in meeting the expectations of their direct reports. Researchers from The Ken Blanchard Companies teamed up with *Training* magazine to poll a cross-section of 456 Human Resources and Talent Management professionals. The purpose was to determine whether established best practices were being leveraged effectively. The survey found gaps of 20 to 30 percent between what employees wanted from their leaders and what they were experiencing.

Dr. Drea Zigarmi is coauthor of "Achieve Leadership Genius" (2007) and "The Leader Within" (2005), and co-developer of several Ken Blanchard Companies' products, including Situational Leadership II and Leader Behavior Analysis II instruments. In addition, he is a professor at the University of San Diego.

Dobie Houson is director of Marketing Research for The Ken Blanchard Companies and is responsible for competitive, market, and customer intelligence.

Jim Diehl is a research analyst in the Product Development Department for The Ken Blanchard Companies and a core member of the Research & Development team.

David Witt is a program director and researcher for the Office of the Future, The Ken Blanchard Companies' think tank, and R&D division.

A QUICK LOOK AT THE PERFORMANCE MANAGEMENT PROCESS

A performance management process comprises three main activities:

1. **Performance Planning:** Where goals are set and standards established.
2. **Day-to-Day Coaching:** The day-to-day interactions managers have with their direct reports, where leaders monitor performance and facilitate progress through coaching and feedback.
3. **Performance Evaluation:** The traditional annual performance review, where employee performance is evaluated against yearly goals.

For this study, each of the three areas was measured using a 70-question assessment designed to evaluate sub-factors of each larger construct. The survey measured responses using a six-point scale ranging from Almost Never and Very Infrequently on the low end to Very Frequently and Almost Always on the high end. Gaps were identified between the frequency of the behaviors employees wanted to see from their leaders and how often they actually experienced them. Percentages were calculated by comparing the summated size of the gap against the summated range of responses for that particular factor.

Questions about key responsibility areas and clear measures and standards were asked as a part of the Performance Planning construct. Questions about monitoring, facilitating and coaching, and feedback were asked as a part of the Day-to-Day Coaching construct. Questions about performance evaluation preparation, performance evaluation meetings, fairness and accuracy were asked as a part of the Performance Evaluation construct. Additional questions were asked about job development and career development as they commonly occur in the context of overall performance management.

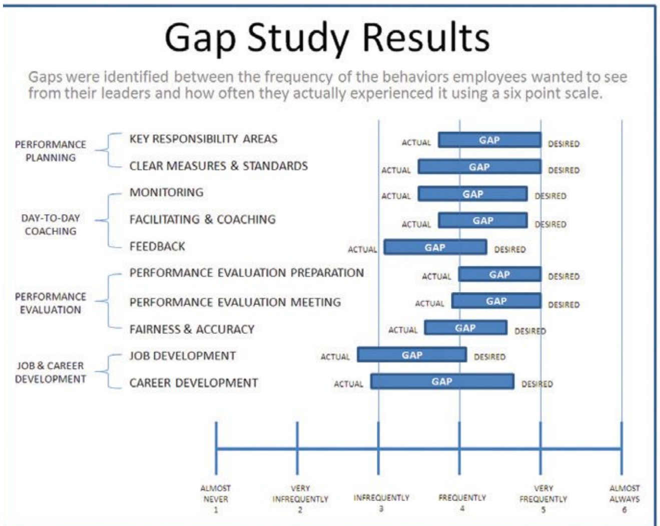

Figure 1: Gap Study Results

PERFORMANCE PLANNING FACTORS

Key Responsibility Areas: Respondents indicated a gap of 1.3 points on the 6-point scale (28 percent) between what they would like to see happening in this area and what they currently were experiencing. This included discussing, prioritizing, and agreeing on the functions of the job and why they are important. It also included taking the time to hold planning meetings that result in the setting of clear, specific goals, as well as allowing the team member to participate in the setting of goals and deadlines for achievement.

Clear Measures and Standards: Respondents reported a 1.6-point gap or 34 percent between real and ideal in this area, which included clarifying how goals are to be measured and allowing for input from the direct report. This section included employee perceptions of the degree to which measures used to assess performance are fair and appropriate. It also included ensuring that measures are appropriately challenging and that performance measures once set—while not easy—can be achieved with hard work.

DAY-TO-DAY COACHING FACTORS

Monitoring: Respondents reported a 1.4-point gap in this area or 31 percent. This included perceptions of how well the leader examines information and tracks progress throughout the year before reaching conclusions about an employee's performance. Progress toward goal achievement, discussions about what was happening in the organization, and perceptions of how well-informed the leader was regarding the quality of the relationships the employee had with others in the organization were measured.

Facilitating and Coaching: Respondents reported a 1.1-point gap existed in this area or 25 percent. This included perceptions of direction and support for getting things done or access to the resources needed to get them done. Perceptions of how the leader helped the respondent accomplish performance objectives by being available, removing barriers, and listening and partnering to improve performance instead of evaluating were among the behaviors measured.

Feedback: Respondents reported a 1.3-point gap in this area, which corresponded to a 32 percent gap between real and ideal levels. This included perceptions about the degree to which a leader provides the direct report with regular, timely information on his or her performance progress. It also included the degree to which the leader enables the direct report to assess his or her own progress and performance. Specific behaviors queried included comparing work to the standards set in the performance planning process and modifying goals when priorities or resources change. It also measured the degree to which the leader sets an example by making it easy for the employee to give feedback.

PERFORMANCE EVALUATION FACTORS

Performance Evaluation Preparation: Respondents identified a 1-point gap, which translated to a 24 percent gap between what they wanted and what they were experiencing. This included the degree to which the leader personally prepares for performance evaluations and the degree to which he or she provides time for the employee to prepare, as well. Specific behaviors included the leader providing direct reports with an opportunity to assess their own performance prior to the scheduled evaluation, thoughtfully considering strengths and weaknesses, and a willingness to modify assessments during and after the meeting.

Performance Evaluation Meeting: Respondents identified a 1.1-point gap in this area, which also translated to a 24 percent difference. This section looked at the performance evaluation meeting itself and specific leader behaviors such as clearly stating the purpose and goals of the review; listening openly to employee explanations and concerns regarding their performance; and discussing strengths and weaknesses by using observable examples of behavior as opposed to comments about character or personality. This section also asked respondents to evaluate the degree to which their boss encourages discussion about reactions and suggestions concerning strengths and weaknesses.

Fairness and Accuracy: Respondents indicated a 1-point gap in this area, which translated in this case to a 31 percent gap. This section took a deeper dive into perceptions that a leader is fair and accurate in his or her assessment of the employee's performance. Specific behaviors included the degree to which a leader shares how the decision on an employee's overall performance level was determined and whether the leader asks direct reports to rate their own performance and then discusses that self-assessment during the performance evaluation meeting. It also looked specifically at whether direct reports can appeal a disputed evaluation with no fear of reprisal.

JOB AND CAREER DEVELOPMENT FACTORS

Job Development: Respondents indicated that a gap of 1.4 points existed or 29 percent. This section looked at respondents' perceptions that their immediate manager conducted performance planning in a way that resulted in at least one developmental goal that would help direct reports progress in their current job. It asked respondents to evaluate the frequency with which their leader discussed job assignments that will help to broaden direct reports' job experience and knowledge. It also asked respondents to evaluate how often their leader discussed the training needed to improve their performance during the current performance period and whether the leader makes time and resources available to help employees get the training they need.

Career Development: Respondents identified that a very large 1.8-point gap existed in this area—almost 39 percent between the levels of real versus ideal conversations happening. This final section asked respondents to evaluate the degree to which their leader prepares them for career advancement—even if it means losing them as a good performer in their current role. It asked respondents to evaluate the degree to which their boss understands the steps that must be taken to prepare direct reports for career advancement, explains the organization policies and procedures that affect career development, and discusses the potential career opportunities for direct reports. It also specifically asked if the leader clarifies the steps direct reports need to take and whether the boss feels the steps are fair and reasonable.

CORRELATIONS TO INTENTIONS

As a part of Blanchard's ongoing research into the factors that build or detract from an engaging work environment, the survey also looked at the correlations between each of the gaps and how they affected respondents' intentions to perform at a high level, apply extra discretionary effort when required, be a good organizational citizen, stay with an organization, and recommend it to others as a good place to work.

The research found significant correlations between the sizes of the gaps as reported by respondents and lowered intention scores—especially in the areas of intent to apply discretionary effort, intent to remain, and intent to endorse the organization to others.

This is an important finding. Earlier research has established the predictive power of intentions and found a significant correlation with subsequent behavior. The results of this gap study highlight the link between employees' perceptions of an organization's performance management process and their intentions to stay with an organization, recommend the organization to others, and apply extra effort when needed. By identifying similar gaps in their own organization's performance management process, leaders at all levels can begin to target and improve areas that are identified as falling short of employee expectations.

RECOMMENDATIONS FOR LEADERSHIP DEVELOPMENT

Performance management is a key leadership responsibility. This survey suggests that significant gaps exist between employee expectations and what they are experiencing at work. Left unaddressed, these gaps represent a drain on overall organizational vitality through lowered employee intentions to stay, endorse, and apply discretionary effort as needed.

For leadership development professionals, these study results provide an opportunity to take a more targeted approach to improving perceptions in each of these areas. For example:

1. **Take a look at the overall design of your performance management process.** Are managers following best practices in setting goals that are specific, motivating, attainable, relevant, and trackable? What percentage of employees have current goals listed? Have leaders conducted an internal assessment to measure the degree to which employees feel their goals are effective in directing and motivating their performance?
2. **Take a second look at the amount of time your managers are spending with their people.** The Ken Blanchard Companies advocates that leaders meet with their direct reports a minimum of twice a month to discuss progress toward goals and address employee needs for direction and support. Monitoring progress and providing feedback are two of the key ways for a manager to stay involved and partner with an employee to achieve goals. Both activities directly influence improved performance.
3. **Review your performance review process.** In many organizations, goals are set at the beginning of the year and not seen again until the review process at the end of the year. Blanchard has identified that a best practice is to conduct a series of mini-reviews throughout the year—every 90 days is the recommended standard. This allows leaders to make mid-course corrections, eliminates any surprises for individual employees, and keeps the partnership between manager and direct report strong and vibrant.
4. **Don't forget job and career development.** Growth opportunities at the job and overall career level are important drivers of employee work passion and one of the better ways leaders can show team members they care and are invested in them. Be sure that all performance review conversations include time for a discussion on ways that employees can improve their skills in their current role and also what steps they can take to continue to advance in their careers.

A renewed focus on performance management can have significant results on the performance of an organization. Give your performance management system a review—and if you find similar gaps, address them for higher levels of employee work passion and performance.

Playing for the Same Team

While independent contractors often pinch-hit for employees in the corporate world, they don't always receive the same training as the rest of the team. It can make a big difference. **BY GAIL DUTTON**

Independent contractors are the pinch-hitters of the corporate world, specialists able to step in on short notice to achieve a goal. Typically, they're responsible for their own development. But as economic conditions continue to increase reliance on independent contractors, a little attention from the Learning & Development team can make a big difference in terms of increasing loyalty and improving work quality.

Membership warehouse club Costco is seeing the benefits now as it aligns employees and consultants from different backgrounds and companies around a common mission. The immediate project, called Cosmos, began in 2012 and integrates finance and the HR/payroll systems with the enterprise resource planning solution. "One of the first steps involved breaking down preconceived notions about the various business functions and understanding the different perspectives," recalls Halley Bock, CEO of leadership training consultancy Fierce, Inc. That required a shared framework of language, tools, and expectations.

Fierce, Inc., helped develop that framework, reminding the team—including contractors—to remain curious about diverse perspectives, to dig deeper, and to continually question reality. As a result, Costco's Cosmos team is developing a cohesive identity and transparency across divisions and organizations that has increased collaboration and is breaking down business unit silos. Consequently, problems are solved faster and everyone is kept in the informational loop.

As Costco knows, inviting contractors to training events "…allows a common language and vision and ensures a common set of goals, which cultivates loyalty and a sense of engagement and commitment," Bock says. For example, the deep knowledge and plethora of acronyms inherent in any specialty can get in the way of cross-disciplinary understanding. Therefore, "including contractors in meetings where everyone relearns the dictionary together becomes a tactical decision."

A BUSINESS NECESSITY

For Green EDU, an accredited Environmental Protection Agency training provider, training independent contractors is a business necessity. The company works with 300-plus contract trainers to provide more than 400 training classes in 50 states. These contractors provide training in asbestos certification, hazardous materials, energy efficiency construction, cleaning and restoration, and many other topics.

They typically are found through social media and Internet ads, as well as through states' lists of licensed contractors. "They're hungry and tech savvy," says Zachary Rose, CEO, Green EDU, "but most importantly, they have real work experience."

But they still need training. "Every second our contract trainers are in the classroom, we are potentially exposed to liability and must take every precaution to ensure our company is protected," Rose says. Each independent contractor brought in to teach a class undergoes an extensive, three- to four-week "train-the-trainer" program before being considered for his or her first scheduled course. The classes are a fusion of asynchronous online, anytime classes, and synchronous classes online and with live instructors. Eventually, before being allowed to teach their own classes, the contractors shadow a senior instructor in a physical classroom two or three times, Rose adds.

Consequently, "we're comfortable sending them onsite and know they'll train our clients correctly. We've converted a good number of contract trainers to full-time employees," Rose says. Those preferring to continue as independent contractors are loyal. "They always put us first," Rose says, "because we help them develop skills that transfer across the board."

GALVANIZE A CHANGING WORKFORCE

As the workforce transitions from permanent employees to independent contractors, freelancers, and consultants, the nature and duration of their projects is changing, says Michelle Benjamin, CEO and founder of TalentReady. "Previously, most contractors worked for a specified time and then moved on to another company. Today, a contractor may work for the same company for many months or years. Best practices dictate that basic new employee training programs also should apply to independent contractors."

Additionally, Benjamin says, organizations are developing training programs to ensure their workforce is trained "not just on corporate policies but in areas prerequisite to performing their job functions."

It also strengthens the relationship between the organization and the contractor. "Inviting contractors and vendors to attend corporate training programs at the corporation's expense creates synergies between contractors and the person managing the relationship," Bock adds. "It's a wonderful opportunity to galvanize a team. And because it adds value to contractors' personal portfolios, it's a great way to strengthen the relationship as they work ahead."

As Sandra L. Edwards, former senior vice president, AMA Enterprise, American Management Association International, points out, "sharing the corporate mission, goals, and strategies helps contractors feel like an important extension of the organization and vested in enabling success."

But there's another, often overlooked, benefit. In addition to enhancing skills, organizations have an opportunity to improve their networks and those of their contractors through social networking during training. This has the effect of building a best practice community that strengthens the talent pool. "It is critical to build a best practice community for your contract trainers to learn from one another," Edwards stresses.

ACCEPTABLE TRAINING

Training for independent contractors can cover virtually any topic. "One of the most useful centers around communication and teamwork," Bock suggests. "Transparency in communications that fosters strong relationships is essential to any team in achieving its goals. Such training allows contractors insight into how the company operates." By not inviting contractors, organizations may miss out on their unique experiences and perspectives and, therefore, fail to achieve the best results.

As another, more technical, example, a client may teach an independent contractor how to bypass the client's proprietary network firewall so the independent contractor may perform the server maintenance for which he or she was

PUSH AND PULL

By Kent Sipes, Training, Communications, and Change Management Consultant, Io Consulting

When training independent contractors, it's important to remember that they typically are paid by the job. When I used to train cable Internet installers, our contractors were paid $40 for every "install." This meant a contractor typically did the bare minimum called for in our company's contract, freeing him (or occasionally her) to move on to the next job. It also meant that contractors only sat through training classes as required to satisfy the contract terms and allow them to complete the install.

On the other side was the cable company—my employer. While the company certainly wanted installations done efficiently, it also was concerned about customer service, perceptions about the company, and allocation of resources (such as modems, IP addresses, bandwidth). This meant that I originally was allotted two weeks to train a group of eight to 12 installers (both company employees and contractors).

The other part of the equation was the end customer, the cable Internet user. The customer was interested first in a working high-speed connection, for the lowest possible cost. Customers also didn't want an installer in their homes for any longer than necessary.

These competing priorities forced me to re-examine what I taught and how I taught it. For instance, there was a portion of the class devoted to customer education—how to help the customer understand and use his or her new high-speed Internet access. Once I realized that contractors would spend almost no time on customer education, I was free to eliminate that portion of the course. Instead, we concentrated on improving our "leave-behind" materials.

I also removed most of the lecture portions of the course, and consolidated much of the hands-on practice. I ultimately was able to condense the course to one week, while still providing the essential training to equip these folks to satisfy our end customers and keep our company profitable.

Training contractors is a balancing act, involving many competing priorities. Understanding the priorities of each group your training serves will increase the likelihood that you'll be able to satisfy them.

contracted, Rose adds. The training would only be how to access the system, not how to perform the maintenance.

As an alternative to providing or paying for training, Benjamin says, "many companies have extended their corporate pricing at local and online training centers to their contractors. The company is not paying for the training, but the contractor can take advantage of the reduction in price."

IRS CONSIDERATIONS

However, good intentions also must meet the letter of the law to maintain the distinction between contractors and employees. "While it's great to see companies making efforts to be contractor-friendly, there are some fine lines to be aware of," says Dave Cassar, VP of Enterprise Solutions for MBO Partners, a company that managed the independent contractors for many of the Fortune 1000 companies. "It's important that an independent contractor maintains control of how, where, when, and who performs the work. If a company trains the contractor on the manner and means by which they are to perform their services, the company is at risk of being classified as a legal employer, which carries risks and fines. Another determinant of independent status is whether an independent contractor brings a high or unique skill level to the client, so consider whether skills-based training could invalidate the contractor's true independent status in the eyes of the IRS or Department of Labor."

The IRS checklist (Form SS-8) helps differentiate between contractors and employees, and addresses training. As a rule of thumb, Bock says, "if a company requires an individual to attend training, the person most likely is an employee." Therefore, she advises organizations to invite—but not require—contractor attendance.

QUICK TIPS

- **Consider including contractors in meetings where everyone learns (or relearns) the company's mission and values and the relevant industry acronyms together.**
- **Since contractors may work for the same company for many months or years, best practices dictate that basic new employee training programs also should apply to independent contractors.**
- **Build a best practice community for contract trainers to learn from one another.**
- **One of the most useful training topics for independent contractors centers around communication and teamwork.**
- **Consider extending your corporate pricing at local and online training centers to your independent contractors.**
- **Check the IRS checklist (Form SS-8) to make sure offering training doesn't invalidate the contractor's true independent status in the eyes of the IRS or Department of Labor.**

Training on the *Move*

Some people like walkabout sessions to stay in shape and get creative juices flowing. Can it work for training? **BY MARC HEQUET**

Which would you rather do: Take a walk? Or sit in a meeting or training session (in person or virtual)?

Before you answer, consider that in a survey of some 220,000 adults, those who sat for more than eight hours a day had a 15 percent greater risk of dying within three years than those who sat for fewer than four hours a day, according to a March 2012 study published in the *Archives of Internal Medicine*.

So combining exercise with training or meetings might be a good idea. While it won't work in every context, a walking meeting or training can be effective, especially when it comes to brainstorming, visioning, reflection, goal setting, networking, etc. "The exercise is invigorating," says Atlanta consultant Ron Broussard, "and studies show walking stimulates a more creative process. It puts everybody in a comfortable state," he says. "The creative juices flow, and participants can bounce ideas off one another."

No less a meeting leader than Greek philosopher

Aristotle may have walked around while teaching. He's associated with a school called the Peripatetics—from Greek for "walking around," or for a sheltered walkway or for the conversation that occurs in such a sheltered walkway. Aristotle, it turns out, had at least one student who particularly distinguished himself: Alexander the Great, who conquered everything from Greece to India and spread Greek culture over the whole area.

In the same high-minded vein, Chicago consultant Bob Wright says he knows of a Vietnamese Buddhist monk who teaches walking meditation.

LEARNING SIDE BY SIDE

Author and business professional Nilofer Merchant blogged in the *Harvard Business Review* in 2013 that she changed a routine coffeehouse meeting to a walking meeting and found that it worked. "I liked it so much it became a regular addition to my calendar," she writes. "I now average four such meetings and 20 to 30 miles each week."

Merchant adds that she can "listen better when I am walking next to someone than when I'm across from them in a coffee shop. There's something about being side by side that puts the problem or ideas before us, and us working on it together."

She adds what may be a key point: "The simple act of moving also means the mobile device mostly stays put away. Undivided attention is perhaps today's scarcest resource, and hiking meetings allow me to invest that resource very differently."

Consultant Matthew Ferrara of Andover, MA, agrees. A walking meeting or training "pulls people away from their smart phones, laptops, and tablets, as well as removes them from potential in-office interruptions," he says.

Merchant, who also lectures at Stanford University, points out that whether it's at a desk, conference table, or coffee shop, we're sitting when we could be moving. She cites research that claims we sit 9.3 hours per day—compared with 7.7 hours of sleep—and that's not a good thing, according to health experts.

HITTING YOUR STRIDE

Training consultant Carolyn Balling regularly conducts early morning walks at *Training* magazine's annual Training Conference & Expo. It's an excellent networking opportunity, she believes, and she has done much the same thing with co-workers in the past.

"Walking while talking is more relaxing than being in a meeting or training room, sitting across a table, or being wedged into our small cubes, where you have to drag in your own chair to have someplace to sit," she points out. "It's the physical action and mindlessness of walking that can open people up, I think. The same sort of relaxed interaction happens when groups do routine physical work, too—such as collating masses of binders for a training project or putting together goody bags for conferences or something where the work doesn't require much thinking, so people talk in a relaxed way."

Ferrara thinks walking meetings work best "when the goal is to explore or brainstorm an issue, opportunity, or challenge. As long as the place people are walking doesn't require a lot of concentration, the combination of physical and mental exercise can lead to some good ideas and discussions," Ferrara says.

What's the best place for a walking meeting or training? Some companies have attractive campuses with walking paths and even ponds. On the other hand, Balling has taken her walking sessions across shopping mall parking lots and along busy streets.

BABY STEPS

Of course, there are a few down sides. If you have something specific to get done during a walking meeting or training session, you may need to limit the numbers. "I couldn't envision more than three or four people," says consultant Wright. And if you have a data dump, you may want to stay with your PowerPoints in a meeting or training room.

If prospective meeting participants are ill, disabled, or just out of shape, the walking session may be viewed as all but impossible, even discriminatory. Another problem: "People just don't want to get sweaty, or are wearing the wrong clothes," Ferrara adds. So if you insist on a walking meeting or training, plan it far in advance, he advises.

Ferrara also finds walking meetings or trainings don't work well when weather is poor, the route is difficult or distracting, or the leader needs to pass along a lot of information. That might mean your walking session needs to be a stroll as opposed to a power walk, especially in hot weather.

That said, you don't have to walk outdoors. What about the mall? Or down your cavernous corporate corridors? Or even in your own office. You now can walk at your own pace while you're working at your keyboard, participating in a virtual meeting, or taking a computer-based training. The TrekDesk Treadmill Desk is an elevated wide desk that is positioned above a treadmill equipped with special motors designed to run for long hours at slow speeds, typically around two miles an hour. So you can walk while you work and get in the 10,000 daily steps recommended by the surgeon general.

Cornerstone Health + Technology High School in Detroit recently purchased a TrekDesk, which has its own office space with a window, and staff take turns using it. "It's not only a great alternative to sitting at a desk," Chief Operating Officer Josh Britton noted in a recent *Detroit News* article, "I find I do my best thinking while in motion."

Likewise, with all the new training apps for mobile phones and tablets, it is possible for learners to walk and be trained at the same time—although audio modules are probably better suited for training on the move than visual ones.

In short, walking meetings and trainings can work, but you must pick your spots. And, of course, be careful not to walk backward, waving your arms to emphasize a point. That look on your learners' faces may not mean they are riveted by what you're saying. It may mean you're about to fall into the corporate pond. t

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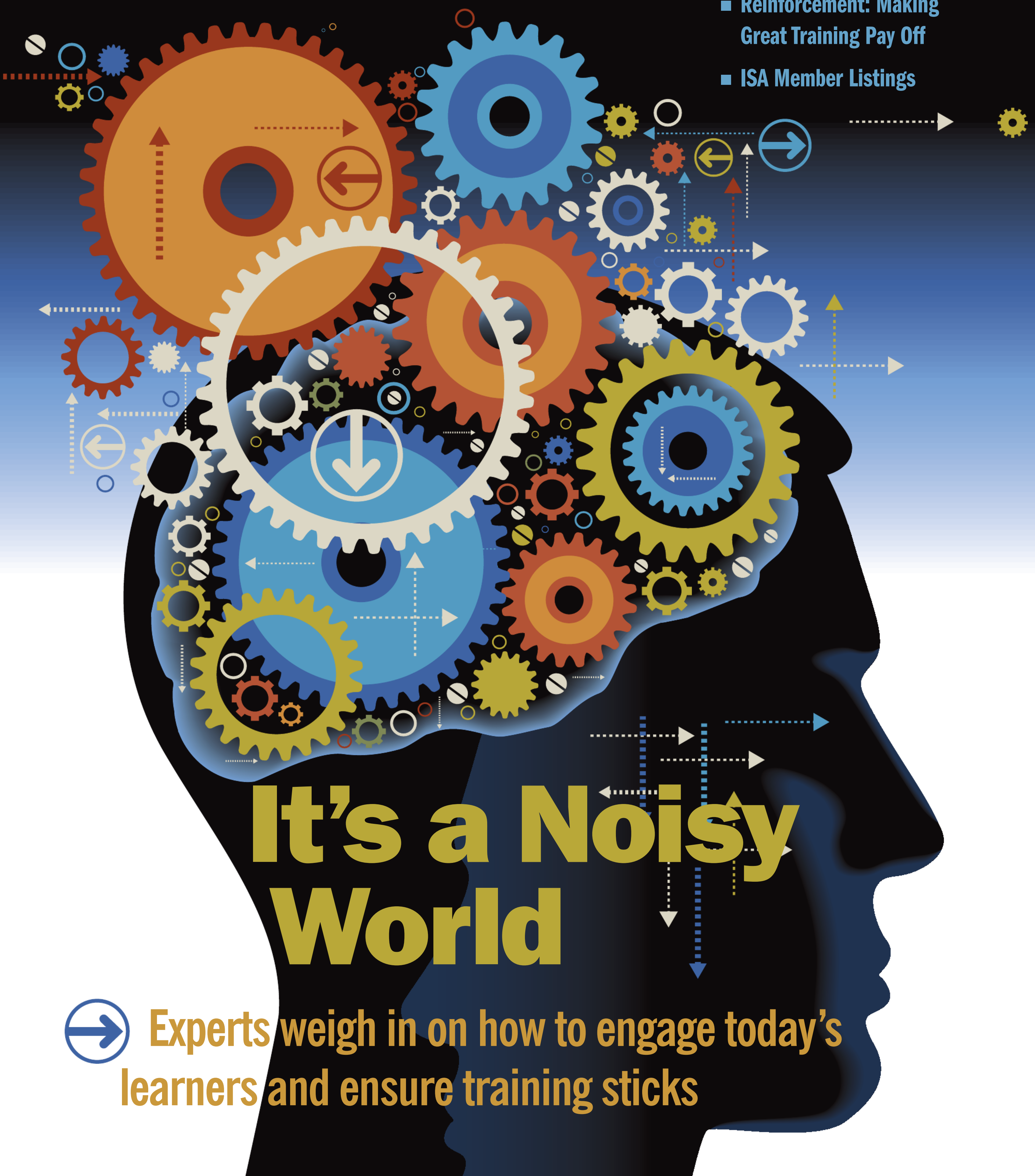

It's a Noisy World

Experts weigh in on how to engage today's learners and ensure training sticks

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It's a Noisy World

Experts weigh in on how to engage today's learners and make sure training sticks.

An interesting thing happened during the years companies pulled back on training: The level of content and information coming at employees from all directions didn't pull back with it. Instead, the noise only grew louder. The competition for attention became fiercer. The disruptions, priorities, responsibilities, and demands piled on at an alarming rate.

From Big Data to social collaboration tools to the never-ending flow of e-mails, employees today are drowning in information. Volume—in all its definitions—is the hallmark of the work environment, and although we have a variety of new ways to reach employees with training, those employees have more distractions getting in the way and more incentives to tune out.

So how do you engage your learners, keep their attention, and get the lasting outcomes you need? ISA member companies Herrmann International and MOHR Retail recently tackled these questions in the book, "Developing Talent for Organizational Results" (Pfeiffer, A Wiley Imprint, 2012), excerpts of which follow.

ENGAGING ALL LEARNERS IN AN AGE OF INFORMATION OVERLOAD

By Herrmann International

Each one of us as a learner is a unique human being with a unique learning style. Consider your own experience: You likely did much better in some subjects than others; surely you responded much more to some teaching methods than others; finally, you retained some material more accurately and for a longer period of time than other material delivered in a different way.

There's a reason for that. Our unique learning style is the result of the brains we were born with, combined with the years of experience that have developed into our own distinctive learning styles over the course of our lives. So we're drawn to certain methods, materials, and areas of focus. It's not about competence; rather, it's about our *preferences*.

While every learner is different, our 30 years of research into these thinking and learning styles has shown that, taken as a whole, the world is a composite of different learning preferences, crossing the traits described in the Whole Brain® Learning Considerations model. This means that any population of more than 100 learners will represent distinct differences in their individual learning and thinking styles. Since each learner population will be diverse in their learning, the most effective training design and delivery methods will take into account an approach that works well across those differences.

Whole Brain® Learning Considerations

A Learns By Acquiring and Quantifying Facts Analysis and Logic Thinking Through Ideas Building Cases Forming Theories	**Learns by D** Taking Initiative Exploring Hidden Possibilities Relying on Intuition Constructing Concepts Synthesizing Content
Learns by Organizing and Structuring Content Evaluating and Testing Theories Practice Implementing Content **B**	**Learns by** Listening and Sharing Ideas Integrating Experiences with Self Moving and Feeling Emotional Involvement Harmonizing with Content **C**

Whole Brain® Teaching and Learning provides the basis for bridging the gap between the individual learner and the design and delivery of the learning. With a Whole Brain® approach, you can better reach and engage with diverse learners, improve their retention, and deliver memorable—rather than forgettable—learning experiences in an increasingly cluttered, fragmented work environment.

Step 1: Understand Your Learners

Review the Whole Brain® Learning Considerations model and think about the populations you serve. How are they different? Similar?

More often than not we do not know the preferences and styles of our learners. Thus, when in doubt, design using a Whole Brain® approach—chances are you will have that diversity anyway. Keep in mind that you also will need to think about other differences, including introversion, extroversion, and generational differences. There are other aspects to audience diagnosis, including size and location of the audience, technical skills, and need for support. To ensure you don't overlook any critical areas, use the Whole Brain® Model to guide your own thinking.

Step 2: Think About Your Learning Design

Now that you have analyzed your learners, your learning design and key learning points require the same. Just as in any learning design, you need to design the instructional approach(es) and delivery methods you will use to teach those critical learning points.

Our research has shown that different design and delivery approaches improve and facilitate learning for each of the four specialized quadrants of the brain. The model at right, for example, shows different design and delivery approaches by quadrants for face-to-face/workshop learning. Use thinking preferences as a guide in creating the optimum blend of approaches across the online and offline spectrum, as well as the four quadrants.

Face-to-Face and Workplace Learning Methods:
The Whole Brain® Way

A

Lectures, facts
Databases, spreadsheets
Research and research findings
Higher order reasoning
Critical thinking
Learning "laboratories" (testing)
Reference books
Readings
Case studies
Use of experts
Applied logic
Metacognition
Theories
Technical approaches
Simulations
Projects

D

Brainstorming and discovery learning
Metaphors
Active imagination, creativity
Learning "laboratories" (exploring)
Illustrations, pictures, photos
Simulations
Mind mapping and storyboarding
Experiential workshops and activities
Synthesis
Holistic exercises
Visualization, mental pictures
Animation, Flash
Games
Shadowing, site visits

Simulations, Projects, Manager as Developer, Learning on the Job

B

Outlines, organization, summaries
Pre- and post-tests, quizzes
Learning "laboratories" (practice)
Practice
Checklists, timelines
Sequenced learning
Self-paced learning
Policies, procedures
Who, what, why, when, where
Workbooks and exercises with steps
Structured problem solving
Clear examples, case studies
References, dictionaries
Tutoring, tutorials, FAQs

C

Cooperative learning
Small groups, team learning projects
Group discussion
Role playing
Drama, body language
Learning "laboratories" (interacting)
Sharing personal experiences
Listening and sharing ideas
Storytelling, journaling
Auditory, musical and rhythmic
Physical, kinesthetic activities
Interviews
Community of practice
Mentoring, apprenticeships, coaching

Step 3: Put It Together in the Context of Your Learning Environment

Depending on your own thinking preferences, the growing list of options technology gives us may seem exciting or overwhelming. Either way, take a step back and focus on the two to five approaches that will best serve your design, your audience, and your organization—within its constraints. Keep it simple and always, always keep the brain in mind. You are, after all, a learner yourself. Put together a Whole Brain® team to help you evaluate your options and think this through.

A World of Choices

This rapidly evolving learning environment means we have an obligation to rethink what we've always done and how we've done it. This doesn't mean we throw out all the old ways, but now we have so many more options that let us actually anticipate learner needs, and we can adapt, using internal social networks, as well as face-to-face and online methods. It's not just a challenge—it's our responsibility to continue to push our thinking in a much more complex world of choices.

Thinking and learning are the new currency in the age of the knowledge worker, and yet it's becoming that much more difficult in our always-on, fragmented environment. Everything you can do to help your learners better target their thinking, invest their attention more efficiently, and leverage their Whole Brain® Thinking skills more effectively will not only deliver results for the individual but for the organization as a whole.

REINFORCEMENT: MAKING GREAT TRAINING PAY OFF

By MOHR Retail

Getting people to actually use what they have learned after a training session can be a challenging and complex task. Let's take a closer look at one tool that is key to ensuring that new behaviors are used back on the job: Reinforcement.

Reinforcement

When a company has identified a skill gap or need for training, there is a substantial amount of time spent *before* any training is done analyzing who to train, how, when, and by whom or in what format, e.g., e-learning, distance learning, virtual classroom. Weeks or even months might be spent on this portion of preparation alone, not to mention the amount of time for actual development of new material to be used during the training. Once those initial questions are answered about the population and training approach, there's the logistical side of getting ready, which might include reserving outside facilities, making travel arrangements, defining equipment needs, and so on. There might be a separate implementation plan that needs to be worked out for national or global implementations, as well as measurement criteria to assess impact. Planning and preparation for training can require a substantial amount of time and resources.

Assuming the actual training content is on target and has been developed with a credible learning design, you are finally ready to begin delivery of the training. The facilitation and/or delivery of training is fairly concise, almost blast-like, when it finally gets to the audience.

While the training professionals have been immersed in this project for some time, the participants might be getting the experience of being dipped into a torrent of information for a very short period of time. Is there a way to get them involved sooner? Using participants to help develop content increases their personal buy-in. Unfortunately, this typically involves only a small percentage of the overall audience. When a company is embarking on a major initiative that requires training, it's important to remember that *training is change*. And we all know how much participants like change. Since there will be a new expectation, a new norm for performance and/or method to performing their job, reinforcing that new norm even *before* managers come to the training is essential. A Level 1 assessment at the end of the training gives you a sense of how confident or relevant the training was. It doesn't tell you if people are going to use it.

The Manager's Role

When we're working with a client charged with a training initiative, one of the early questions we like to ask is, "What is the role of senior managers in developing their people?" The question almost always evinces some kind of reaction: a knowing smile, a frown, or nodding in agreement. What comes next is not always as encouraging. Many clients understand the importance of what happens back in the field, but they also know senior managers are rarely interested and/or fully equipped to reinforce what was learned. Not to mention having the time to reinforce it.

Training of any kind is just the beginning. In order to receive a full return on the investment of time, money, and effort involved in being away from the field, it's critical to have planned follow-up and reinforcement. Managers often look to their supervisor's behavior to set their own priorities. Do they really want me to use what I learned? Is it really as important as they said? Will anybody notice if I don't change to the new norm? The role of the senior manager is to ensure that what was trained actually gets used. It's the best way to maximize productivity of any training.

When training sessions end, the facilitator's work may be finished, but the participants' work has just begun. The end of a session is the beginning of new behaviors and use of new tools and skills learned.

Think back to the last time you learned something new. Were you perfect after the first lesson? Probably not. What you had were fundamentals that required practice and attention. Who better to follow up and reinforce your efforts, as clumsy as they may feel, than your senior manager? It sends a powerful message that the expectation for change is strong and they have your back. Reinforcement not only ensures better results from more consistent use of training. It also builds trust and strengthens a critical coaching role your senior managers play every day. Reinforcement makes great training pay off again and again.

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PART 4:

MasTec Tackles The LMS

How this utility infrastructure construction company designed and developed a customized learning management system (LMS) to manage its new training programs. **BY JOHN CONGEMI**

Throughout this year, *Training* magazine has covered the efforts of MasTec's Utility Services Group to build a culture of learning from the ground up. We've followed its journey as it launched

a U.S. Department of Labor certified lineman apprentice program and as it created a world-class new hire orientation training program. In this issue, we take a step back to learn how this utility infrastructure construction company designed and developed a customized learning management system (LMS) to manage its new training programs.

MasTec's Utility Services Group (USG) identified early on the need for an LMS to serve as a foundation for the training and development initiatives it had planned. This was due to several factors. First, up until recently, the great majority of the training had been instructor led. Even when technology was utilized, it required a supervisor or instructor to proctor a DVD viewing session. Tracking participation and completion was even less efficient. Course completions were tracked via sign-in roster sheets, which had to be photocopied and placed into each employee's file. MasTec was looking to change all of these things as the organization began one of its largest change initiatives ever: the build and implementation of an online LMS.

STARTING FROM SCRATCH

The first step in designing a training portal to support MasTec's new training programs was to do a thorough needs analysis. What technology and functionality would be needed to support the new and forthcoming training initiatives? What were the unique needs or restrictions of the employees? What are the current and future pain points that must be solved? How will we be tracking and measuring success going forward? There were many questions to be answered before jumping into the waters, especially because most MasTec employees had never used an LMS and the introduction likely would be a bit of a shock.

The USG Employee Development team began by doing a stakeholder analysis. By considering who would need to be engaged in the process, how to partner with each of them, and what type of input they could offer, the team could ensure from the beginning that everyone would be ready for this change. From there, they began meeting with various stakeholders throughout the organization to answer these questions and more. They met with everyone—from safety team leaders and trainers to construction crew members across the country. They observed employees fulfilling their job duties and attending existing training classes. They made note of every need and wish list request made at all levels of the organization.

WHAT GOOD LOOKS LIKE

The team was determined to ensure it was building a robust solution that would meet the organization's needs for years to come. Upon completion of this analysis and stakeholder phase, the team identified four high-level goals. All design components would be applied toward one of these four goals:

1. Increase accessibility of training content
2. Provide flexibility and variety in how training is conducted and completed
3. Improve the process of registering and approving employees for training
4. Create reporting tools that give visibility to training requirements, participation, and completion

QUICK TIPS TO GET STARTED

- **Bring everyone into the design process. It's important to learn from all stakeholders—from senior leadership to employees new on the job.**
- **Set goals/requirements, then ensure that every functionality component is tied to one of those goals (just like learning objectives).**
- **Even after testing and usability stages, ask for feedback often. Employee needs and preferences may change over time.**

MasTec's Utility Services Group employees are spread throughout the country. While some work in big cities and report in to well-networked offices, others work in more desolate, rural locations. This made increased accessibility of training content and flexibility of delivery a must.

Also, because there is a strong need for hands-on training in the utility construction industry, e-learning is never going to completely replace instructor-led training sessions at MasTec. However, even the instructor-led courses will benefit from the LMS, due to the improved scheduling capabilities and reporting functionality. It's all about modality options and an enhanced ability to track training.

PUTTING IT ALL TOGETHER

With the criteria for success set, the team created and launched a new training portal called the USG Learning Center. This LMS now serves as the one-stop shop for all of the organization's training functions. Employees can log in from any location where they have access to the Internet. This addresses the concern many had about their proximity to a MasTec office. Once they log in, they're within a click or two from the New Employee Training curriculum, the entire library of e-learnings and videos, and the schedule of instructor-led training courses being offered. Employees also can access the company's Safety Training Bulletins and apply for the U.S. Department of Labor certified lineman apprentice program.

Leaders within the organization are also just a click or two away from reports highlighting the training requirements and completions for their direct reports. Supervisors can access records that display course completion dates, quiz scores, and potential expiration dates for any training their employees have completed.

Although learning management systems are standard fare in many industries, this implementation is somewhat revolutionary for the utility construction field. This industry relies heavily on field experience, instructor-led training, and hands-on practical experience. Many organizations in the field haven't found a way to leverage the benefits associated with an online learning tool. MasTec's Utility Services Group now is reaping the benefits associated with its customized training portal. Although the training site always will be evolving, as the organization responds to feedback and enhancement requests, it appears to have hit the bulls-eye. t

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John Congemi is director of Employee Development, Utility Services Group, MasTec North America, Inc.

STRATEGIES FOR SUCCESS

Training magazine taps 2014 Training Top 125 winners and Top 10 Hall of Famers to provide their learning and development best practices in each issue. Here, we look at mentoring and competency maps.

Mentoring

By James J. Darby, CPLP, Instructional Designer, ESL Federal Credit Union

When Kelli Loveless, manager of Learning & Development at ESL Federal Credit Union, looks back to January 2005, she shudders for a moment. At the time, Loveless was a senior training performance specialist responsible for training new hires for various front-line positions. She recalls feeling a sense of dread as promising new employees left the organization, one after another—some within just a few weeks of starting at the Rochester, NY-based financial institution.

Exit surveys and anecdotal information confirmed what she suspected: The majority of those who chose to bolt did so because they felt "abandoned" after they completed new hire training and began their actual job. "Many of the people who left were overwhelmed, and they didn't have a 'go-to' person they could consistently reach out to for help during the transition phase," she says. "Training is a safe environment where everything works and no one is yelling or putting pressure on you. But the 'real' job seemed far different and less forgiving to those who chose to leave us."

Loveless and her training colleagues also had a strong notion that a formal mentoring program would greatly benefit both new employees and the organization. They were confident a mentoring program would not only help new hires, it also would benefit our customers through a better service experience. "Plus, we knew it would save the organization the huge expense associated with frequent turnover," says Loveless.

After gaining buy-in from senior management to pilot a mentoring program, Loveless and front-line district managers set about identifying candidates on the front-line staff who would meet several basic criteria needed to teach and help new hires. Next, a full-day workshop was developed to give mentors the tools they needed to succeed in this role.

Nine Years Later…

Fast-forward to 2014, and a robust mentoring program is in place at ESL.

Every new hire in a front-line role with daily customer contact is assigned a mentor who has walked in this person's shoes recently or still serves in the same role. Each of ESL's 20 branches has at least one mentor to informally shepherd new hires. (The Mentor Program is in addition to the formal coaching and guidance new hires receive from their managers.)

The mentors—who volunteer to participate in this on-the-job training program—share job knowledge and exchange ideas with new trainees and provide other constructive forms of support. Trainees observe their mentors modeling the correct behaviors and skills in various member interactions. Learning from the actions of others helps provide trainees a safe transfer from the training environment to the actual job.

Mentors and trainees also complete a mentor checklist and an online survey, which Learning & Development uses to identify and address any skill or content gaps in the front-line training curriculum. This approach helps ensure a more positive employee experience for trainees and customer experience for ESL's members.

To ensure the continued success of the Mentor Program, L&D offers a self-paced online refresher module to supplement the instructor-led workshop and coaching new mentors receive before they begin in this role. These blended learning solutions develop the skills and qualities needed to be a successful mentor, provide insight into how adults learn, offer tips and techniques on effective communication, and suggest specific approaches on how to give feedback to a trainee.

Results

ESL's formal Mentor Program and one-on-one coaching directly support the organization's strategic goal of hiring and developing capable and committed people. The effectiveness of the Mentor Program and coaching is borne out in a key statistic tracked by the Talent Management team in the company's Human Resources department: Our 90-day turnover figure was a remarkably low 1.09 percent (year-end 2013), down from 3.33 percent during the same period a year ago and 4.92 percent in 2011. Overall, ESL's current turnover rate is an exceptionally low 12 percent, less than half the 24.4 percent industry average.

Tips

1. **Pick your mentors wisely:** Maybe your mom or dad once told you: "Choose your friends wisely!" This same good advice holds true for picking mentors in your organization. Just because someone is considered a high performer doesn't mean this individual necessarily would make a strong mentor. What should you look for in your mentors? Says Loveless: "Effective mentors typically share several key traits: They are people oriented, good motivators, capable of inspiring others, and effective listeners and teachers. In fact, those individuals who have strong coaching and interpersonal skills consistently rate as the 'best' mentors." L&D has developed a checklist of the characteristics, skills, and qualities that other effective mentors in the organization have exhibited. L&D provides this list to managers and seeks their help in identifying people who possess these traits.
2. **Recognize the efforts of your mentors:** Every year, ESL hosts a dinner to recognize the efforts of all company mentors and those who have contributed to the success of the program, including the L&D, Talent Management, and Branch and Contact Center teams. Mentors also receive various other perks (e.g., business card holders inscribed with the words, "You make the difference") to affirm them for their commitment to the success of fellow employees.
3. **Offer your mentors an incentive:** You won't find many people in today's fast-paced workplace who have a lot of extra time on their hands. So it doesn't hurt to offer your mentors some incentives—especially when you consider the help they provide to new employees and the value they bring to the organization. ESL rewards front-line mentors by reducing their sales goals during the mentoring period. What's more, those who volunteer for this program gain respect and visibility from colleagues and managers alike. The Mentor Program offers an ideal career path for those who aspire to manage others. Says Loveless, "Whenever people ask me what they need to do to get ahead in our organization, I recommend they volunteer to serve as a mentor. The same coaching, teaching, and listening skills that make someone an effective mentor are applicable to leadership positions in our company."

Mentoring

By Christine Marciano, CIC, ITP, CLCS, Commercial Lines Training Consultant, Nationwide

It seems as if everything comes from the Greeks. The Greek word, "marathon," describes the 26.2-mile run that was made from the city of Marathon to Athens to carry news of the war. The Greek word, "odyssey," describes Odysseus' long return home after the Trojan War. The word, "mentor," also has Greek origins. Mentor was a character in Homer's epic poem, "The Odyssey." He was charged with looking after the son of Odysseus. Mentor specifically was chosen to be a role model, support structure, and trusted advisor. Care was taken to select a guide of integrity, wisdom, and counsel. The job was intended to be short term. Odysseus planned a triumphant return, yet the adventure dragged on longer than expected. It was a good thing he chose wisely because Mentor had the job for 20-plus years.

While we don't expect to ever have a mentor relationship that lasts this long, we can use the tale of this first mentor relationship to reflect on ourselves. As lifelong teachers and learners, let's ask some thought-provoking questions of our own. Would you benefit from a mentor? How would one be chosen? Could you become a mentor to someone else?

Step 1: Creating Your Roadmap

Have you ever considered finding a mentor? Plato said, "When the mind is thinking, it is talking to itself." Sage advice. If you have thoughts to move into a new division or work group, or take it up a notch in your current chair, that's great! What if you don't currently have what you'll need to succeed? You might think the logical first step is to make a short list of people you already know, who can tell it like it is. Actually, that's step two. It's easy to miss step one. Step one is creating an inventory of what you need to grow and what you hope to get from the relationship. Reflect on your current role in your industry. Consider the skills, reputation, and connections you use now and compare them to those that may be required in the role you want. Perhaps you need enhanced technical skills, or more effective personal relationships, or someone who can act as an advocate for you. Maybe gaining business acumen, learning company history, or improving your personal brand would serve you best.

This can take time; don't rush it. This is your roadmap, and everything you create should be compared to your roadmap. It is truly the hardest part; many people skip it. This can lead to disappointment and wasted time. Notice the word, "can." Yes, wonderfully successful mentor relationships can spring from anywhere. Truly effective, time-efficient ones will start with a list. Sure, you can have a great adventure just by jumping in a car and driving. But if you want to get to California, your car had better be facing west. Try it. Make the list, let it sit for a bit, then revisit it.

Step 2: Choosing a Mentor

Now that you feel good about where you'd like to go, we can move to step two, selecting an appropriate mentor(s). How do you choose a mentor? You'll already have a coaching relationship with your supervisor, so don't ask him or her. Your tendency may be to choose someone you already know and like, as most of us enjoy hearing good things about ourselves from others. Instead, branch out to the department you'd like to grow into, a leader in a different work group from yours, or even someone outside your company.

Other tips:

- **Consider your own personality and communication style.** Are you better off working with someone who is a lot like you or your opposite?
- **Build your candidate pool.** Look for someone you respect, not just a heavy hitter in your company. Ask the opinions of others, too. "Thomas, I'm looking to improve my skills to become a project manager, do you think Matthew could help me get there?" As you approach candidates about mentoring you, let them know what you appreciate about them, and be clear about what you want out of the relationship. This is the time to confirm that your candidate has the relevant experience and knowledge you seek, is willing to share it, and feels comfortable offering guidance and feedback to you. Not everyone does. Do they have time and interest to meet with you? Perhaps you'd consider more than one mentor; you may have several areas you'd like to strengthen.
- **Finish the details of your plan.** Gain agreement on how often you'll meet. Monthly phone call, quarterly lunch, and e-mails for support are all good. With all our technology, having a remote mentor also could be workable. Consider video chat. Discuss what the agenda will look like, how you will create it, and how follow-ups should be handled. It's your job to do the heavy lifting here. Your mentor is the invited guest, so it's your responsibility to get what you need out of the relationship.
- **Agree on what success will look like and when your formal relationship will end.** Most mentoring relationships will last about a year. Yes, you can keep it going for 20 years like Mentor did. But poor Mentor should have been offered a choice; your mentor should get one, too. Throughout your journey together, be appreciative. Small gestures go a long way. You are receiving a gift, so remember to say thank you.

Being a Mentor

Now that we've gotten you a mentor, ask yourself if you'd like to be a mentor to someone else. "Any man may easily do harm, but not every man can do good to another," Plato noted. Mentoring someone is a tricky business. This relationship is not about you. Can you share your own experiences while not sounding like a know-it-all? You will be in a position of trust and may hear personal or confidential information. You may be asked for brutal honesty, especially if your mentee is trying to repair, rebuild, or rewire themselves. Be sure you're up for it, and can keep these confidences.

You may feel pressed to offer flat-out advice and to-do lists to your mentee. Remember, you are a guide in growth. The learning experience belongs to mentees. It is their job to research, dig, and do for themselves. You are but a facilitator of learning. They get to set the agenda and develop their learning plan. You get to ask the debrief questions about what was successful and why. Try to encourage your mentees to consider alternate interpretations of events, and to look at situations from a new perspective. Your value is in encouraging them and inviting their self-discovery. It can take a little longer to allow your mentees to get to their own "aha" moment. Guide. Be patient. Don't rush.

A few more guidelines for those considering being a mentor:

- Always keep the meeting, avoiding interruptions or cancellations. Take good notes to stay focused and provide a history of your time together.
- Ask for feedback with questions such as, "Am I providing what you need?" "How else can I support you?"
- Make changes as needed.
- Quietly model the behavior you are trying to encourage.
- Show, don't tell.
- Always express appreciation for the mentee's accomplishments. Every small step is a big win. Celebrate the journey together.

A Rewarding Odyssey

Throughout our lives, we will seek advice from others, as well as offer it. Whether it is formal or informal, mentoring is a valuable tool. Approach it with sincere intentions, and build a safe environment for you both to grow. You'll develop better communication skills, plus the art of giving and receiving gracious feedback. It takes work, and may feel like a marathon, yet your odyssey will be rewarding. Plato said, "For a man to conquer himself is the first and noblest of all victories." Think for a moment where you'd like to go next in your career. Then take the first step to get there.

Competency Maps

By Andrew J. Hoskins, Training & Development Manager, Bass & Associates, P.C.

Founded in 1990, Bass & Associates, P.C., has had the opportunity to work with talented and intelligent employees. Many have been with the company for more than a decade, helping Bass & Associates excel within our industry, while others have moved on to new endeavors. All have experienced Bass' commitment to help them grow personally and professionally. We have several programs to aid in that growth and we work to ensure that the growth contributes to our company's goals. Among the tools we use are competency maps.

Challenges Faced

Our industry is evolving constantly. As such, we need to continually develop our staff. This might seem elementary—of course, you want to develop your staff. However, with an ever-changing business environment, we must develop skills that provide long-term advantages. It is vitally important that our staff members are competent and knowledgeable in the activities they perform. They also must understand how those activities impact our ability to achieve our goals. Continuing to teach our staff the same way we did in 1990 was not always sufficient.

Resolution

We needed adaptable training that would be in line with our company's goals. We required a complete understanding of the needs of each position, allowing us to assign the best people to those positions, armed with the knowledge needed to succeed. The development of our competency maps has helped to accomplish this.

When most people think of the word, "map," they think of a document that gives directions to a goal. That is exactly how we think of competency maps. Competency maps traditionally are defined as a process for identifying an individual's strengths and weaknesses. We see the use of competency maps not only as a process for identifying an individual's strengths and weaknesses, but also a process for achieving a goal.

Bass uses competency maps during several stages of employment. For the purposes of this article, I will focus on one stage. In our orientation, each employee is evaluated to aid in determining his or her learning style. That knowledge is used with our Stage Based Training program, which includes the initial competency map and is broken into—you guessed it—stages. This map lists skills needed for the position, and sets timelines to learn those skills. When employees are deemed competent, meaning they could teach the skills to another or have passed testing, they sign off with their supervisor on that portion of the map.

This is where the competency part comes in. Employees are asked to fill out "Progress Check" forms during this time. Progress Checks allow employees to list what skills they feel most and least comfortable performing. They must review them upon completion with their supervisor. From there, we adjust the training program (map) to accommodate the needs of the learner and our company at the same time.

Results

The resulting interaction and documentation gives both the employee and the supervisor a solid understanding of the strengths and weaknesses of the employee. This knowledge is valuable even after the Stage Based program is completed. Supervisors can adjust as needed, to get the most effective results in the employee's development. The competency map also can be maintained to document achievements of each individual for personal satisfaction. From a strategic perspective, we can track the average time to competency per skill, as well as identify areas where employees struggled with the program. This knowledge has helped us to know where to update the training program to achieve the most success. Since enacting this program, employees are completing their training an average of 25 percent sooner. This has saved thousands in training dollars and increased production. In addition, supervisors have noted that employees who have completed the program have entered the production force more prepared than those prior to the program.

Tips

We have found that for best results, our competency maps must:

- **Be clear:** There must be a clear understanding of what is expected.
- **Be adaptable:** People learn in different ways, and part of the purpose of a competency map is to identify strengths and weaknesses. Only then can you get the most from the competency map.
- **Allow for communication:** By communicating with learners and accepting their feedback, you are more likely to get their buy-in with the process.
- **Be reviewed:** This has two meanings. The first is that you should review the competency map with employees to make sure they are progressing at an acceptable rate. The second is to make sure your maps are always in line with your company's strategic goals.

training TOP10 Hall of Fame

OUTSTANDING TRAINING INITIATIVES

For the first time since the creation of the Training Top 10 Hall of Fame in 2008, *Training* magazine required all Hall of Famers to submit an Outstanding Training Initiative that would be shared with our readers throughout the year. Here are the details of Ernst & Young LLP (EY) and SCC Soft Computer's submissions.

EY: Global New Partner Program 2012 – Beijing, China

EY's Global New Partner Program is the global organization's annual training program that commemorates newly promoted partners' significant career milestones and achievements by delivering targeted course and speaker content that helps its new partners from around the globe prepare for the challenges that lie ahead. This training program focuses on what it *takes* to be a partner and what it *means* to be a leader. It also recognizes the significance of the personal and familial support network. All 540 new partners—and their significant others—from every EY service line/line of business and from member firms in approximately 150 countries were invited to attend the 2012 Global New Partner Program in Beijing, China.

The program brings together a global and culturally diverse audience every year in a different location. During the three-day program, EY member firm partners share knowledge based on client, industry, and market experiences and enhance their global mindset by networking with colleagues from around the globe. In 2012, the EY Training team connected with the EY Mobility team to coordinate the visa process for more than 1,000 partners, significant others, and instructors, as well as support staff from all corners of the world. Collaboration among EY teams from around the globe, including those based in China, as well as in-country external suppliers, helped overcome linguistic, cultural, and operational challenges.

Pre-Program

EY developed a series of Webinars that were delivered to the newly promoted partners approximately two months prior to the 2012 Global New Partner Program. The Webinars spotlighted the upcoming program and helped the new partners prepare mentally and emotionally for the changes in their:

- Financial relationship with their EY member firm
- Goal-setting process and performance measurement process
- New and highly visible leadership role

As such, the Webinars emphasized the importance of leveraging EY's expanded support system and explained EY's dedicated one-on-one executive coaching infrastructure.

Program Content and Delivery

During the 2012 program, EY delivered the core content with specific themes:

- Being a partner
- Account leadership
- Leading our people

The program's format alternated between large and small group settings and networking activities. Examples include plenary sessions focusing on a diverse range of topics, geography-based and service line-based breakout discussions, polling during sessions with Q&A content adapted in real time to respond to polling results, and classroom settings that reinforced the program's themes.

In addition, significant others were encouraged to attend sessions that focused on what they could expect during the partner transition period and beyond.

Reinforcement

To reinforce the learning objectives, one-on-one coaching sessions between each new partner and a dedicated

EY-employed executive coach occurred throughout the year after the Global New Partner Program. The coach focused on helping the partner:

- Execute on key topics discussed at the program
- Recognize typical issues and challenges, and leverage the appropriate professional and personal tools to address them

Regular discussions with the new partner's sponsoring partner provided focused opportunities to adjust or reinforce behaviors learned during the program, in relation to the partner's performance objectives.

Measurement

On a scale of 1-5 (5 being the highest), new partners rated the program 4.57 overall, with 64 percent giving a 5 rating.

SCC Soft Computer: Clinical Laboratory 101 | Lab Basics

Laboratory information systems (LIS) provider SCC Soft Computer has grown rapidly in the last 15 years, from a global company with just 401 employees in 1998 to 720 in 2001 to nearly 1,700 in 2013. SCC's hiring rates were helping to keep its turnover levels low, but for those who did leave, the company learned from exit interviews that 50 percent of departing employees cited lack of training as a key reason for resigning. Upon further investigation, SCC discovered that although it was training them on how to complete tasks, employees without clinical lab backgrounds or medical experience were frustrated because they lacked a basic understanding of the unique language, culture, and day-to-day activities that exist in a medical lab. This made it difficult for them to communicate effectively with both clients and colleagues.

Content Development and Delivery

In 2010, SCC introduced a new in-house certification course, Clinical Laboratory 101 | Lab Basics, to address the challenges faced by staff members who didn't have clinical laboratory backgrounds and help them understand the processes and workflow of a clinical laboratory. SCC retooled the program in 2012 as a fully blended learning solution in response to feedback received.

SCC's team of instructional designers, multimedia specialists, and LIS trainers created a multi-module e-learning program using Adobe Captivate and input from subject matters experts (SMEs) and loaded it onto the learning management system (LMS). For the instructor-led portion, SCC created games in PowerPoint to reinforce concepts and terminology introduced in class and to prepare students for self-study. A Skillsoft course introduces learners to the health-care environment. Captivate simulations of SCC's LIS software demonstrate how health-care professionals use the software applications in the lab. The program consists of the following courses:

- **Medical Terminology** (blended self-study course featuring a one-day interactive instructor-led session, textbook, and related online exams)
- **The Healthcare Industry Overview** (e-learning course)
- **Introduction to Medical Laboratory** (e-learning course chunked into modules)
- **Terms and Acronyms** (quick reference tool)

To reinforce the training, managers from SCC's Client Services/Technical Support business unit administer quizzes, monitor client phone calls, and suggest follow-up training to reinforce areas of difficulty.

Developing this training in-house enabled SCC to tap into its wide SME network to deliver information and knowledge that is typically only available at the college level and with a high investment in terms of time and money. In addition, the program has reached SCC staff from across the organization, from Technical Support to Programming; from Clearwater, FL, and across the U.S. to Poland and Ukraine.

Results

On average, SCC's 90-day onboarding period costs $25,000 per employee. During this time, SCC must invest time and materials to train. Since 2012 and the implementation of Clinical Laboratory 101, more than 75 percent of newly created positions have been filled by internal candidates (up from 36 percent the previous year), which creates openings for other employees to move into, as well as positions for new hires. With the original Clinical Laboratory 101 program, launched in 2010, SCC trained 60 students in its U.S. headquarters. With the 2012 relaunch, it trained an additional 127 students globally. These positions have saved SCC $3.675 million in onboarding costs alone, allowing SCC to focus on other training efforts.

This ongoing initiative has resulted in a steady increase in SCC's retention rate, and lack of training no longer is mentioned as a factor for departure. Employee self-evaluations show steady improvement in self-confidence and job knowledge. And SCC's clients are noticing the difference in the ability of SCC staff members who don't have prior clinical lab experience to communicate more effectively with them and "speak" their language.

Unconscious Bias

Research demonstrates that we all harbor unconscious biases. The good news is that enhanced awareness and training can create an inclusive culture that identifies and helps eliminate these hidden biases. **BY NEAL GOODMAN, PH.D.**

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Prejudice and discrimination are detrimental to the success of any organization. Yet research from the Kirwan Institute and others demonstrates that we all harbor prejudices; at a minimum, everyone is subject to their own unconscious bias **(http://kirwaninstitute.osu.edu/wp-content/uploads/2014/03/2014-implicit-bias.pdf).** Unconscious bias is the result of messages (from a wide array of sources) introduced into our subconscious from an early age. Many of these prejudices that are deeply held in our unconscious can unconsciously influence how we act toward one another in our organizations.

Since many of these prejudices exist beyond the conscious level and are a result of being brought up in a culture that harbors biases, we first must acknowledge that they, in fact, exist. You do not have to be racist or sexist to implicitly support racism or sexism. These unconscious biases are not restricted to any one group, and they differ significantly from open and legislated forms of prejudice and discrimination such as usage of a derogatory name.

Multiple studies have shown that resumes with names that are related to under-represented groups are less likely to be invited for an interview as identical resumes with "dominant" group names. So, for example, in the U.S., a resume submitted with the name, "Leroy," is less likely to result in a job interview than a resume submitted by "Jonathan." In the UK, "Ali" is less welcome than "Edward." Resumes submitted by "Jennifer" also received fewer requests than "John." In meetings, opinions expressed by women are taken less seriously than the same opinions expressed by men of the same status. Doctors are less likely to order medical tests for people of color, etc. One of the paradoxes of such unconscious biases is that those who are discriminated against also are likely to discriminate against their own kind, since they have been brought up with the same prejudices as everyone else in the society.

The implications of unconscious bias are that the best and brightest talent often is made to feel unwelcome, invisible, and not important to the success of the organization. This results in employees who are detached and likely to take their talents elsewhere.

The good news is that, while no one is immune to their own unconscious bias, through enhanced awareness and training, these prejudices can be changed. Organizations are slowly recognizing that they must provide training on unconscious bias to create a more inclusive culture. However, it's not uncommon for companies to inadvertently go down the wrong path. There are some positive training considerations that can improve the likelihood of a training initiative's success.

WHAT CAN YOUR ORGANIZATION DO?

- **Set realistic expectations.** Do not over promise and under deliver. Raising expectations that unconscious bias training will eliminate all bias would be disingenuous. The goal is to be conscious of our biases and not to pretend to be blind to differences that exist.
- **Provide appropriate time for the training.** It has taken a lifetime to develop our biases; they cannot be overcome in a two-hour session. Ideally, several short sessions or one full day is a minimum.
- **Provide the training in person.** This topic requires interaction, trust, and the opportunity for people to meet in a safe environment. E-learning or Webinars are not appropriate delivery methods for unconscious bias training, nor will they produce measurable change.
- **Be judicious in selecting the right facilitator.** Do not select trainers only because they took a course on diversity, see this topic as "their passion," or are from an underrepresented group. Trainers should be highly qualified and well versed in the social psychology of attitude formation, be excellent and empathetic facilitators, and have a non-threatening and inclusive style that avoids guilt trips.
- **Incorporate unconscious bias assessment tools such as those provided by Project Implicit.** This tool **(http://projectimplicit.net/index.html),** which helps to uncover hidden biases on many criteria—including, race, gender, disabilities, and age—has been used more than a million times to uncover hidden biases. Trainers also

must know the pitfalls of this test and the way people interpret the outputs from the Project Implicit Website. Trainers must ensure that the trainees are not misinterpreting results and have support as required.

- **Focus the training on specific, real situations, such as reviewing resumes, conducting interviews, responding to customers etc.** An example of an outcome: Asking how to correctly pronounce someone's name is a micro-affirmation, while not using someone's name because you are afraid of embarrassing yourself is a micro-inequity.
- **Address the topic of in-group favoritism** and how it operates in the organization. Research shows that a lack of diversity creates "group think," while diverse viewpoints result in more creativity and innovation.
- **Identify those situations** in which our implicit biases run contrary to our organizations' explicit values.
- **Use proven successful simulations, role-plays, and other interactive exercises** that help people take the perspective of others. Many standard tools used in diversity training are inappropriate.
- **Have groups discuss the words, phrases, symbols, jokes, and other symbolic representations** of their group that they find offensive and why.
- **Provide de-biasing, counter-stereotyping activities** such as making associations that go counter to existing stereotypes (male nurses, female scientists, elderly athletes).

EXPECTATION OF CHANGE

Simply learning about our hidden biases is not sufficient. Successful training also must help participants to identify and build skills to overcome these biases. That said, it is unrealistic to expect that our unconscious biases will melt away after a single training program. Follow-up training and/or coaching will help to reinforce the original training. Metrics that demonstrate changes in behavior, such as the percentages of underrepresented candidates selected for development programs, should be a part of any follow-up to demonstrate the commitment to take action.

If you have any best practices around unconscious bias training or any questions on this topic, send them to me at: **ngoodman@global-dynamics.com.**

Start With Why

The key to developing engaging education lies in first establishing the motivation to learn. **BY TONY O'DRISCOLL**

Author Simon Sinek's popular TED talk urges companies to "Start With Why" in their quest to maintain sustainable competitive advantage in an increasingly complex, confusing, and cluttered world. Sinek argues that firms that focus on what they do or how they do it in communicating their value to customers lose their footing because they are not connecting on an emotional level with their customers.

Sinek describes a simple model he calls the Golden Circle that has "Why" in the middle, "What" in the next ring out, and "How" in the ring after that. In applying the Golden Circle to Apple, Sinek contends that while Apple makes excellent computers (the What) that are beautifully designed and easy to use (the How), what people really connect to is the fact that Apple challenges the status quo in everything it does (the Why). It is the emotional connection with "Why" Apple exists—not the product itself—that attracts legions of followers to the Apple store with each new product release. Apple thinks "different," and people connect to the company's "Why" on a visceral and emotional level. As a result, Apple enjoys a position of sustainable and differentiated competitive advantage.

BALANCING CARROTS AND STICKS

Game designers also use a circle model to create compelling—some would argue addicting—gaming experiences. Raph Koster's book, "A Theory of Fun for Game Design," delves deeply into the game mechanics of tokening and leveling to maintain the ever-illusive state of engagement that resides between challenge and boredom. In focusing on what he calls the Magic Circle, Koster argues that game design is all about balancing carrots and sticks. The aim is to keep the gamer fully engaged in what Hungarian psychology professor Mihaly Csikszentmihalyi calls a state of Flow: the mental state of operation in which a person is fully immersed in, energized by, focused on, involved in, and enjoying the process of activity.

Closer to home, Malcolm Knowles, the father of Andragogy and author of "The Adult Learner: A Neglected Species," recognized that as people mature, they:

- Become more self-directed in their learning
- Draw upon their own experience in learning something new
- Are more interested in learning subjects that have immediate relevance to their jobs or personal lives
- Become more problem centered and time sensitive in their orientation to learning
- Are more intrinsically motivated to learn
- Need to know why they need to learn something before committing to doing so

The common thread that links Sinek's observations on strategic competitive advantage, Koster's insights on engaging game design, Csikszentmihalyi's concept of Flow, and Knowles' principles of Andragogy is one simple word: Why!

PAUSE FOR A MOMENT

This edition of *Training* focuses on employee engagement, motivation, and talent management. To survive and thrive in an increasingly complex, connected, and confusing world, Human Resource professionals would do well to heed Sinek's advice to "Start With Why." Too often, as Learning professionals, we are overly focused on "What" we will learn and "How" we will deliver it, with very little attention paid to "Why" the learning is needed and how it will add immediate value to the learner.

By starting with why and working out from the middle of the Golden Circle, we might be able to leverage the insights that consultants, game designers, social psychologists, and adult learning theorists have known for a long time: **The key to developing engaging education lies in first establishing the motivation to learn.** The establishment of motivation can only be achieved by answering that one simple question: *Why?*

So next time you are engaged in a discussion about what learning objectives a program must deliver or how the program might best be delivered, pause for a moment to consider why the program exists in the first place and why people would want to participate in it. Armed with this insight, the better likelihood that the program you develop and deliver will be optimally attuned to the motivations and needs of your adult-learner audience. t

Tony O'Driscoll is regional managing director of Duke CE in Singapore, where he focuses on identifying and implementing next-generation learning strategies and approaches that accelerate the development of Leadership Sense-Abilities in this rapidly growing part of the world.

E-Learning in Higher Ed

Online learning in higher education poses different challenges due to unique characteristics of the market. **By Saul Carliner, Ph.D., CTDP**

Although most major employers in North America have offered some online learning for several decades and given it an increasingly significant role in training and development efforts since the early 2000s, the transition from classroom to online learning is just starting to happen in major universities.

The catalyst? MOOCs: Massive Open Online Courses. They catapulted into the popular consciousness in 2012 with the threat of disruptive change. In response, leading research universities rushed to join consortia of companies providing MOOCs. Other universities rushed to establish their online presence.

While MOOCs are not proving to be as disruptive as once predicted, the new focus on the technology they spawned has spurred most universities and colleges to hasten the move online using more conventional approaches to online learning and the support of learning.

Although in some ways, the shift to online learning in universities and colleges shares similarities with the earlier transition among employers, in other ways, unique characteristics of the higher education market will shape the way these institutions adopt online learning.

Hybrid Courses

Several unique issues face institutions of higher education. Like employers, the right choice for many higher education courses is neither an all-online or an all-classroom course but rather a blended course. What's different in higher education, however, is the emergence of a particular design for blended courses called flipped or hybrid courses, with instructors designing the online portions in a particular way to impart knowledge so they can use classroom time for problem-solving and similar activities.

As trainees have managers and performance support tools to assist them in mastering what they have learned and transferring it to the job, students in higher education have similar needs for assistance with learning, though the specific needs usually differ from those in the workplace. Technology is emerging to provide tutoring and academic advising, and to link students to sophisticated libraries and provide some career counseling, among other types of support.

Research suggests that the most commonly performed type of evaluation is learner satisfaction (Kirkpatrick's Level 1) and the highest level of interest is in Return on Investment (ROI, one measure of Kirkpatrick's Level 4, impact). Fewer than half of training programs are assessed for learning. In contrast, 100 percent of all higher education courses must be assessed for learning because the assessment forms the centerpiece of the grade. Concerns over the integrity of exams administered online pose one major roadblock to the adoption of online learning in higher education. Developments in technology are addressing these concerns.

IP Clashes

But perhaps the most significant challenge in adopting online learning in higher education is intellectual property. Unlike most workplace learning programs, for which the employer "owns" the content or licenses it, most universities do not own their own courses. Professors retain full rights to their courses and the materials produced for those courses, except in a few rare instances. A clash over intellectual property has stopped efforts to launch online learning on some campuses.

But this copyright ownership issue also has an impact on the role of instructional designers, who produce online learning programs in higher education. They play a more consultative role—similar to that of a development editor of a book—than instructional designers who create workplace learning programs.

To learn more, join me as I host the Higher Education Symposium preconference event for *Training's* 2014 Online Learning Conference, which explores the unique challenges of designing and administering online learning programs in higher education. t

Saul Carliner, Ph.D., CTDP, is the Research director for Lakewood Media, and an associate professor and Provost Fellow for e-learning at Concordia University in Montreal.

A Tribute to Don Kirkpatrick

Saying goodbye to Don Kirkpatrick, a friend and colleague—and a true legend of the training profession. **BY BOB PIKE, CSP, CPAE, CPLP FELLOW**

Bob Pike, CSP, CPAE, CPLP Fellow, is known as the "trainer's trainer." He is the author of more than 30 books, including "Creative Training Techniques Handbook." You can follow him on Twitter and Facebook using **bobpikectt.**

As I was finishing my Trainer Talk column for this issue, I received word that Don Kirkpatrick had passed away on May 9 at age 90. Until just last year, he still was visiting local ASTD (now ATD) chapters on occasion, though his last presentation at ASTD ICE was three years ago—when he was *only* 87! He served as president of ASTD in the early 1980s (I was on his board); received ASTD's highest individual award, The Gordon Bliss Award; and was one of the first inductees into *Training* magazine's HRD Hall of Fame. And in 2007, Don received the Asia HRD Congress' lifetime achievement award.

In the late 1940s and early 1950s, he already had formulated his seminal Four Levels of Evaluation:

Reaction: Did they like it? We often refer to this as end-of-course evaluations or smile sheets.

Learning: Did they learn it? We use testing to measure this. But if you don't do a pre-test as a baseline, the post-test is invalid.

Behavior: Did they use it? We often look at this via follow-up interviews with supervisors.

Results: Did it make a difference to the organization?

TURNING KIRKPATRICK UPSIDE DOWN

For more than 60 years, Don consistently and persistently pressed trainers on the need to more effectively evaluate training. His son and daughter-in-law, Jim and Wendy Kirkpatrick, partnered with him to make his model even more rigorous and useful by introducing the change of evidence and return on expectations.

About 15 years ago, I wrote an article saying that we needed to turn Kirkpatrick (meaning the model, not the man) upside down. Don wrote me a letter after its publication jokingly telling me that he was too old to be turned upside down. What I wanted to emphasize is that too many organizations focus on Levels 1 and 2, but the real value in evaluation is in Levels 3 and 4.

Too many Training directors and above use the excuse that Levels 3 and 4 are too difficult, time consuming, or expensive to measure. I think that often is an excuse used out of fear that if we did measure it, we'd find that the training we delivered did not produce results or add value.

Don also recognized that, and as part of his lasting legacy, he partnered with Jim and Wendy to make the entire model more useful and implementable by organizations that really want to know what's working and what's not—organizations that know the time for smiles sheets or tests alone long has passed.

> Don was always about exactly how I sign off each of these columns—adding value and making a difference. He will be missed, but my life and those of thousands of others are richer because we knew him and were influenced by his work.

WHO ARE THE NEXT TRAINING GURUS?

At ATD's International Conference and Exposition this year, I was introduced as a luminary, along with others who played a major role in sections of the organization's second edition of its "Training and Development Handbook." While we were at the launch party, I had a conversation with some of the other authors, among them Ken Blanchard and Elliott Masie, about the state of the profession—especially concerning the age and legacy of "gurus."

When people perennially present at *Training* magazine's Conference & Expo or ATD ICE, they develop guru status among training practitioners. This was my 37th year presenting at ATD, and I've presented at every *Training* magazine Conference since its inception. Don was head and shoulders above that (others such as Ken Blanchard, Thiaggi, Beverly Kaye, and Jack Phillips are in that same arena).

But who will follow us? I think my daughter, Becky Pike Pluth, is one of those. I think Jim and Wendy Kirkpatrick are already gurus. But we need more.

What about your own organization? Do you have gurus in workplace learning and performance—or does much of the Training or Learning & Development function rotate through for a few years on the way to some other career spot in the organization? How are you capturing the legacy knowledge of those who have real experience and knowledge?

Why do I ask? Because each of us who has chosen training and development as a career shares the same passion and commitment Don demonstrated before all of us. For him, this was his profession. He had a lifelong commitment to furthering the profession and demonstrating to all stakeholders the value that training and development brings to the organization.

He was always about exactly how I sign off each of these columns—adding value and making a difference. He will be missed, but my life and those of thousands of others are richer because we knew him and were influenced by his work.

So here's my challenge to you:

Drop me a note with the subject line, "training guru"; send it to **BPike@BobPikeGroup.com**; and tell me who in our profession has influenced you profoundly. Who is your training guru and why? I'll summarize the list for those who respond, and maybe it will be part of a future column.

Until next time—add value and continue to make a difference. t

Sharing Stories to Show Truth

Leveraging the internal tales of leadership to reinforce positive culture and right behaviors. **BY ROY SAUNDERSON**

Roy Saunderson is author of "GIVING the Real Recognition Way" and Chief Learning Officer of Rideau's Recognition Management Institute, a consulting and training firm specializing in helping companies "get recognition right." Its focus is on showing leaders how to give real recognition to create positive relationships, better workplaces, and real results. For more information, contact **RoySaunderson@Rideau.com** or visit **www.Rideau.com.**

I have always loved John P. Kotter's book, "The Heart of Change," and the significant statement he made: "People change what they do less because they are given analysis that shifts their thinking than because they are shown a truth that influences their feelings."

Sharing stories is an amazing way to show people the truth in any organization. When stories are well publicized, they help influence people's feelings and affect their beliefs, which, in turn, reinforces desired behavioral change and results. Think of the times you have heard of the nameless Dutch boy who saved the day by putting his finger in the dyke—a short tale highlighting one person's heroic and simple act that saved the day.

In today's workplace, we don't hear of too many tales that become legends that change people. It's difficult for C-suite leaders to both initiate connections and stay connected with all of their employees. They have a hard time being visible and available to employees. Too many of these leaders are considered the "invisible minority" in their workplaces where workers have no relationship with them and lack the trust to be fully connected.

A TRUE STORY

The following true story exemplifies the life of one leader and how his actions have affected the people he works with and their organization—highlighting how these employees became exceptionally engaged and performance focused.

Let's take a look at Tangerine (formerly ING DIRECT Canada), a newly renamed financial services organization with corporate offices in downtown Toronto. The legendary stories of its CEO, Peter Aceto, drive Tangerine's culture to be shared by everyone, as well as produce desired results.

Peter Aceto strongly believes companies with the most engaged employees are the companies that truly perform over the long term. He also knows employee engagement is one thing he can directly control and something that needs to be high scoring in order to beat the competition.

What is not common are the practices Aceto has put in place at Tangerine to stay connected with all the employees. "I spend a fair bit of my time connecting with people at all different levels of the organization," he says. Besides his direct team that reports to him and the typical one-on-one and team meetings, Aceto holds regular Town Halls with departments. However, in addition to the en masse meetings, Aceto takes time out during regular lunch hours to simply sit in a room or cafeteria with staff, bring his own lunch, and talk business.

People love to share information with their CEO. From these informal meetings with employees, Aceto gains a lot of insight, which becomes a natural engagement measure that doesn't have to wait until an annual survey is conducted. It just means getting out on the front lines and mostly listening.

"I can learn an awful lot from them about what they know about the organization," Aceto points out, "and I can judge how well their managers are doing in terms of our philosophy. We believe that every one of our employees needs to know as much about our business as possible, whether it appears relevant to his or her specific job or not."

Getting to this level of leadership commitment requires time. When asked how much time he spends on creating relationships and getting to know people in the organization, Aceto responds, "it is slightly more than 30 percent of my day. I spend about 20 percent in meetings, maybe 30 percent of my day doing stuff that's 'anti-social,' such as reading memos, writing documents, reading presentations. But almost every other interaction is relationship building."

BE MORE HUMAN

Dr. Robert Cialdini, author of "Influence: The Psychology of Persuasion," suggests leaders in today's world of information overload need to "be more human" if they are to stand out. I think the accounts of Peter Aceto become the power stories employees draw upon in becoming the leaders of tomorrow.

A fundamental quality of authentic leaders has to be the ability to connect with people at all levels of the organization. Peter Aceto not only enjoys doing this and makes the time to do so, but he is aware that connecting with people is an important investment.

Find the stories of your leaders, whether with the title or not, and retell these accounts to influence the attitudes and behaviors of your employees.

Engaging Training Participants

Research shows that the more closely the subject matter is related to a participant's job, the higher the levels of engagement, retention, and post-classroom application. **BY MICHAEL ROSENTHAL**

Michael Rosenthal is managing partner of Consensus **(www.consensusgroup.com),** a negotiation and conflict resolution firm headquartered in New York and with regional offices in the Middle East that offers an array of services through three practice areas: Consulting, Training & Development, and Peace Building. For more information, contact **mrosenthal@consensusgroup.com.**

Q Prior to transitioning from working in a business unit to a talent development function, I would enroll in classes with titles that promised to be interesting and enriching. However, once I was in the classroom, my mind would wander, and I would count the minutes until it was over. How do I ensure that participants pay attention during the programs I line up for them?

A: We've all felt trapped in a classroom, feeling that we're wasting our time just being there. This usually happens when we feel we're not learning anything that would have a positive impact on our life. We question the source, the validity of the presentation, and whether it's applicable to our situations.

As someone in talent development, here are three things you can do to avoid this from happening in your sessions and to increase participant engagement:

1. Whenever possible, use subject matter experts. This is especially important when addressing senior audiences. Professionals acquire all types of skills through "real-life" experiences, both inside and outside of work. And when someone feels they know as much as the presenter, they become skeptical of the material. Similarly, if the facilitator can't answer participants' complex questions to their satisfaction, they tune out. Thus, a facilitator should have in-depth subject matter experience, with a history of successfully applying the concepts in the workplace (and not merely teaching them).

For example, one reason clients engage our firm to improve their negotiation skills is because of our field experience negotiating business deals and hostage situations, as well as consulting to heads of state and resolving deadly conflicts. Not only does our experience provide credibility and prevent skepticism about whether our methodologies are practical for "the real world," but it allows us to delve as deeply into the topic as an audience requires, with no question being out of bounds or too difficult to handle.

2. Adopt curricula that use exercises to drive the learning. While slideshows and organized presentations have their place, adults learn and remember through experience. So try to use a mixture of exercises that, on the one hand, draw people out of their work contexts, and, on the other hand, reflect the work they do on a daily basis. The former helps participants focus their attention on the theories and skills you are imparting, while the latter helps them see the relevance to their everyday lives—when they understand how the training will help them, it further helps them focus their attention and their memory.

3. Customize each curriculum to meet the unique aspects, challenges, and goals of the particular audience. While many companies do a great job of creating syllabi that target objectives on an organizational level (i.e., Negotiation Skills for GenericCo Employees), they fail to take a more granular approach and offer different syllabi to meet the different needs of individual audiences.

Research shows that the more closely the subject matter is related to a participant's job, the higher the levels of engagement, retention, and post-classroom application. Accordingly, you should try to create a different syllabus for each audience (i.e., Negotiation Skills for GenericCo Junior Salespeople, Negotiation Skills for GenericCo Mid-Level Operations Professionals, Negotiation Skills for GenericCo Senior Accountants, etc.).

At the same time, try to incorporate uniformity among all of the related offerings, especially with regard to frameworks and cultural aspects. For example, all GenericCo negotiation offerings use the "Consensus Framework" and/or all GenericCo negotiation workshops promote the idea of putting the other party's needs on par with our own. This creates a company-wide approach, and avoids fractioning within the organization and confusion among individual contributors, especially when they move from one function to another.

Transforming a leader's ability to change obstacles to opportunities has evolved. It begins now.

One resource. Three definitive tools. For Change Leadership.

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Discovery Learning Inc.

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Early-Bird Discount...see page 16

Training magazine's

Online Learning Conference 2014

Certificate Programs ....September 21 – 22
Co-Located Events...........September 22
Conference ....September 22 (4 pm) – 25

McCormick Place • Chicago, IL

Co-Located Events

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LEARNING. FOR A CHANGE.
User Conference

training TOP 125 technology think tank

HIGHER·ED SYMPOSIUM

Produced by: training Lakewood Media Group LLC

www.OnlineLearningConference.com

***Training* magazine's**

Online Learning Conference 2014

LORRI FREIFELD

Editor-in-Chief, *Training* magazine

Every night when I was a little girl, my dad wove a new bedtime story about two best friends named Susie-Q and Myrtle. Their adventures tended to mirror those of my partner in crime, Kristen, and me. When I lost my two front teeth, so did Susie-Q – and her dad taught her to whistle just like mine did. When Kristen scraped her knee learning to ride her bike, so did Myrtle – which didn't stop either one from getting right back on and careening down the block.

Forty years later, I still remember those stories. They were personal, they had heart, and they taught me something. I think that storytelling element – that connection – often is what's missing from eLearning.

That's why we've paired sessions on the latest technology tips and best practices with an eclectic group of "HighNotes" that will help us take online learning to the next level.

- eLearning pioneer Michael Allen shouts, "We're not gonna take it anymore!" when it comes to ineffective eLearning. He will challenge us to stop the madness of creating useless eLearning and instead embrace the values and characteristics of what he calls Serious eLearning.
- Instructional designer Cathy Moore will show us how to do exactly that – how to implement those values and characteristics, right now!
- Former Pixar story artist Emma Coats will explain how to craft a tale so we can engage our learners and help them remember.
- *New York Times* best-selling author Austin Kleon will reveal how to make our lives easier by being "creative kleptomaniacs" when it comes to crafting eLearning.

Just as most organizations utilize a blended approach when it comes to delivering training, I believe such an approach likewise is necessary when developing training, particularly eLearning. We're too distracted by our devices and those must-read e-mails. We need to slow down for a moment and connect with each other in person to creatively and collaboratively brainstorm the best possible approach to eLearning. What better way to do that than at the Online Learning Conference? I look forward to seeing you in Chicago!

WHAT'S INCLUDED IN A CONFERENCE REGISTRATION

- 4 HighNote Sessions to help you take your online learning to the next level
- Your choice of 7 of 56 how-to Breakout Sessions and 2 of 16 Sponsored Lunch & Learn Sessions
- Your choice of 3 of 28 Best Practice Speed-Sharing Roundtables
- Your choice of 1 of 8 Hands-On Clinics on Wednesday
- Conference App and participation in Gamécon
- Daily lunches, coffee/soda breaks and a Tuesday evening Sponsor Reception
- Dinner event at Buddy Guy's Legends Club including the Ttvs Awards Program
- A Training Magazine Network Special Conference Preview Webinar Series

WHO SHOULD ATTEND

Training, learning and performance professionals from public, private and academic sectors...

- CLOs, L&D VPs, Directors, Managers and Practitioners
- eLearning Managers, Designers, Developers and Instructors
- College Administrators, Instructors and Educators
- Performance Consultants and Talent Development Managers
- Corporate University Managers
- Curriculum Managers, Training Specialists, Coordinators
- Project Managers
- eLearning Analysts
- Current and Past *Training* Top 125 Winners
- **Anyone charged with increasing workplace performance through the use of learning technologies.**

Schedule

SUNDAY, SEPTEMBER 21

8:30 am - 3:30 pm . . . . 2-Day Certificate Programs*

MONDAY, SEPTEMBER 22

8:30 am - 3:30 pm . . . . 2-Day Certificate Programs*
8:30 am - 3:30 pm . . . . Allen Interactions User Conference*
8:30 am - 3:30 pm . . . . Top 125 Technology Think Tank *
8:30 am - 3:30 pm . . . . Higher Ed Symposium*
4:00 pm - 5:00 pm . . . . **Conference Kick-Off HighNote**
5:00 pm - 6:00 pm . . . . Sponsor Reception
6:00 pm . . . . Dutch Dine Around

TUESDAY, SEPTEMBER 23

8:00 am - 9:00 am . . . . Breakout Sessions
9:15 am - 10:15 am . . . . Breakout Sessions
10:30 am - 11:30 am . . . . HighNote
11:45 am - 12:45 pm . . . . Sponsored Lunch & Learn Sessions
1:00 pm - 2:00 pm . . . . Breakout Sessions
2:15 pm - 3:15 pm . . . . Breakout Sessions
3:30 pm - 4:30 pm . . . . HighNote
4:30 pm - 5:15 pm. . . . . Best Practice Speed-Share
5:30 pm - 9:00 pm . . . . Buddy Guy's Legends Club Event + Ttvs Awards Program

WEDNESDAY, SEPTEMBER 24

8:00 am - 9:00 am . . . . Breakout Sessions
9:15 am - 10:15 am . . . . HighNote
10:30 am - 11:30 am . . . . Breakout Sessions
11:45 am - 12:45 pm . . . . Sponsored Lunch & Learn Sessions
1:00 pm - 2:00 pm . . . . Breakout Sessions
2:15 pm - 4:45 pm. . . . . Hands-On Clinics

THURSDAY, SEPTEMBER 25

8:00 am - 12:00 pm . . . . Tours* (Naval tour starts at 6:00 am)

Additional fee, see page 16

Get Real Face Time. Experience The Fun.

We Want Your Ttvs!

Apply for the Top Training Video Awards today! Send us a two-minute clip of your most effective and engaging training video. Our expert panel will choose the Top 5, which we'll screen at a special awards dinner at Online Learning Conference where attendees will select the No. 1 video on the spot. Visit ***www.OnlineLearningConference.com/tvs.cfm*** to submit your video by June 18, 2014. (Limit of 2 submissions per company; both training vendors and in-house training professionals are eligible to submit.) We'll get the popcorn ready!

Network & Nosh

After the kick-off highnote, mix and mingle with your fellow attendees at the Sponsor Reception. You'll view the latest online learning trends and technologies in our sponsored tabletop demo area. Light hors d'oeuvres will be served. Need more time? You'll also have the opportunity to network with tabletop demo sponsors during conference breaks.

Buddy Guy's Revisited: Sweet Home for the Blues & the Ttvs!

Tuesday, September 23, 5:30 PM – 9:00 PM

Dave Carroll,
United Breaks Guitars

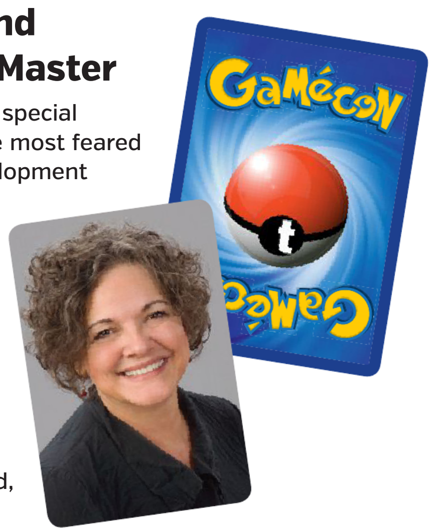
Because it rocked last year, *Training* magazine has once again reserved Buddy Guy's Legends, a Chicago landmark owned by five-time Grammy winner bluesman Buddy Guy, for a special evening event. You'll kick off with a screening of the top five Ttv entries introduced by Dave Carroll, a master storyteller known for his creative use of social media and his YouTube sensation 'United Breaks Guitars,' a music video that chronicles his customer service experience with United Airlines. Join Dave in a fun judging process to determine the #1 Ttv winner. While the night's still young, you'll enjoy dinner, drinks and some of Chicago's best music with former Buddy Guy keyboardist Brother John and his band.

This event is FREE to all conference attendees.

Prepare for Battle and Become a Gamécon Master

Become an elite trainer by using special training gauntlets to fight off the most feared and strongest learning and development professionals. Find fellow training allies and training items to give you strength. Did we say there would be fabulous prizes? Yes! There will be fabulous prizes.

Your card game wizard will be Deborah Thomas, CEO of Silly Monkey and an expert in developing powerful game-based, serious-play learning design.



Don't Dine Alone Mixer

Expand your connection opportunities on Monday evening with dedicated dining options at Chicago restaurants that meet your budget! Choose from several dining locations and facilitators for a fun dinner. Meet your fellow participants and maybe meet that one key person at the Don't Dine Alone Mixer.

Note this is a pay-on-your-own event. Sign up at: ***www.OnlineLearningConference.com***

Pre-Conference Certificate Programs

These 2-Day Certificate Programs give you the essential knowledge, practiced techniques, and sound theories you need to become (and remain!) a top performer in your field. You'll not only walk away with a certificate (and ebadge), you'll also jumpstart your career and enhance your professional know-how.

Additional fee required; see page 16.
Lunch is included Sunday & Monday.

SUNDAY & MONDAY, SEPTEMBER 21 & 22 8:30 AM – 3:30 PM

P01 Fundamentals of Designing and Developing Cost-Effective eLearning

Kevin Siegel, *President, IconLogic, Inc.*

There are multiple tools available that will let you create compelling eLearning content including Adobe Captivate, Articulate Storyline, TechSmith Camtasia Studio, and Adobe Presenter. But which tool is the best, most affordable option for your needs? Once you select your eLearning tool, what's next? How do you get started creating your first eLearning content? Once you start, how long is it going to take you to finish? What's the real cost for your effort? Are there hidden costs? How will you be able to measure the effectiveness of your eLearning? Learn to:

- Identify the fundamentals of effective instructional design.
- See a demonstration of some of the top eLearning creation tools and how they compare.
- Outline the eLearning development process.
- Create a step-by-step storyboard/script.
- Create a voiceover script to support the eLearning lesson.
- Create an interactive simulation using an off-the-shelf eLearning development tool.
- Publish the eLearning content for the widest possible audience.

This is a tool-agnostic workshop...the concepts you learn will be applicable in any of the top eLearning tools you can buy off-the-shelf.

BYOD: Please bring your WiFi-enabled laptop pre-loaded with at least the trial version of Adobe Captivate 7, Articulate Storyline, TechSmith Camtasia Studio 8, or Adobe Presenter 9. You'll also need Microsoft Word, and Microsoft PowerPoint. The instructor will demonstrate how to create effective eLearning in each of the above eLearning tools, but you'll get to work in your tool of choice.

P02 Building Interactive eLearning with Adobe Captivate

Joe Ganci, *President, eLearning Joe*

Adobe Captivate is the most popular eLearning development tool. Now is your chance to learn Captivate and take advantage of its very latest features as well as those that have been around since the start. You'll learn how to publish to HTML5, create drag-and-drop exercises, record system audio along with narration, reusable advanced action templates, and much more. Over the course of two days, you will build a real eLearning lesson that you'll be able to take back with you and customize to your needs. How cool is that? You'll build a lesson that includes a soft skills sample and a software simulation built in a brand new way. Learn to:

- Combine text, audio, video and images.
- Add click-, drag-, and rollover-based interactions
- Add pre-built learning interactions and games.
- Use smart shapes to create your own buttons.
- Add photographic and illustrated actor characters as mentors.
- Create a high definition video you can upload to YouTube.
- Create a pretest and set up partial and negative scoring.
- And, so much more! No more boring training.

With a little effort and guidance, you will be able to use and repurpose Captivate elements in your own lessons. Come prepared to learn and have fun!

BYOD: Please bring a WiFi-enabled laptop with Microsoft Word and PowerPoint installed. If you do not already own Adobe Captivate v7, download the latest trial version from www.adobe.com/products/captivate.html no sooner than 20 days before class (so that it doesn't expire before class begins).

P03 Designing and Developing Scenario-Based eLearning in Articulate Storyline

Ray Jimenez, *Chief Learning Architect, Vignettes for Training*

Learn to build step-by-step interactive stories, scenarios and experience-based learning. You'll apply workshop templates, processes, and methods, and use Articulate Storyline software exercises to develop your own mini-projects. Learn how to:

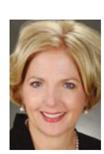
- Prepare and develop engaging stories, scenes, events, and characters.
- Embed learning objectives, content, work exercises, and applications.
- Add tension, discoveries, fluffs and flurries, loops, choices, and consequences.
- Use Articulate Storyline to quickly transform your stories and scenarios into micro-interactions.
- Convert PowerPoint and Presenter files into Storyline scenarios.
- Apply Storyline features such as layers, branching, and built-in images and templates.

BONUS! Take home 10 story- and scenario-based eLearning models and templates, and eBook versions of Scenario-Based eLearning and Story Impacts.

BYOD: Please bring a WiFi-enabled laptop with Storyline, MS Office, Adobe Reader and Flash player. If you are using a Mac, check with Articulate support to inquire about Mac support for Storyline.

P04 Designing, Facilitating, and Managing the Virtual Classroom

Jennifer Hofmann, *Author,* The Synchronous Trainer's Survival Guide



Are you planning on converting face-to-face content to a synchronous platform? Or do you just need a solid, practical foundation so you can be ready to create and deliver effective virtual learning? This program provides the building blocks for successfully designing, facilitating, and managing your live online classroom initiatives, while exploring the experience from the perspective of a learner, a designer, a facilitator, and a producer. You'll apply instructional design methodology to create collaborative synchronous exercises. You'll look at the available features of two of the current virtual classrooms, Adobe Connect and WebEx Training Center, in order to better understand how to design for a virtual environment. You will also practice some of the skills needed to design for and facilitate in a live virtual classroom. Learn to:

- Fully utilize the collaborative features of a live classroom environment, including whiteboards, breakout rooms, polling, application sharing, and synchronized web browsing.
- Analyze the objectives of a prospective course to determine if delivery in the virtual classroom is appropriate.
- Create and critique whiteboard, chat, application sharing, web browsing and breakout room activity designs.
- Employ a simple four-step disaster recovery process in the virtual classroom.

BYOD: Please bring a WiFi-enabled laptop. Although this program is being delivered face-to-face, you will use both Adobe Connect and WebEx Training Center in order to better understand the environment.

P05 Mobile Productivity: Trends, Tools, and the Way Forward

Angela Hamilton, *Mixed Emerging Technology Integration Lab, University of Central Florida;* ***Colin Forward,*** *Director of Business Development, Allogy*

When it comes to mobile, we need to change the way we think about productivity tools. Mobile productivity should be described by four basic functions: learning, documentation, communication, and reporting. In this program, you'll see demonstrations of how you can use existing technology to create custom apps for mobile productivity using examples from Google, Tyco, Johnson & Johnson, DOD, and large hospitals. You'll participate in exercises designed to help you unify all four functions into a single framework. You will:

- Identify specific differences in the developmental strategies behind mobile and desktop productivity suites and list how these differences affect their functions, usage, and capabilities.
- Be equipped with statistics regarding mobile learning and productivity in order to contextualize your own work within real-world scenarios.
- Apply the principles of integration and collaboration in mobile productivity to your own work environment.
- Learn to make the business case for mobile.
- Examine issues of mobile content management and the tools to address them.
- Explore designing for mobile – the look and feel.
- Discuss what's next for mobile: wearable tech, augmented reality, low energy Bluetooth, video conferencing, gamification, Watson in your pocket.

BYOD: Please bring your WiFi-enabled laptop and Android or iOS device.

Co-Located Event

allen interactions User Conference

LEARNING. FOR A CHANGE.

MONDAY, SEPTEMBER 22 8:30 AM – 3:30 PM $395 (includes lunch)

ABOUT THIS USER CONFERENCE

Training magazine welcomes innovative custom training development company, Allen Interactions, for its first ever User Conference to be held in conjunction with the Online Learning Conference.

This is your chance to learn from eLearning industry pioneer, Michael Allen, the innovative force behind the legendary authoring tool, Authorware, the recently launched premier authoring system, ZebraZapps, and author of bestseller *Leaving ADDIE for SAM.*

Join Michael, the Allen Interactions' team, and a number of Allen Interactions' clients as they equip you with advanced approaches, best practices, tools, and candidly share real-life experiences of the challenges and success when designing and delivering performance-focused learning events.

Be prepared to interact and participate in activities that will boost your training to a level that your learners will love!

Morning Session – Achieving Meaningful Design

Creating meaningful, memorable, and motivational learning experiences cannot be just wishful thinking; it has to be achieved within the constraints of practicality. In this session, you'll learn the concepts and best practices that have made Allen Interactions a top award-winning custom training development company. Get ready, because this is not just a lecture-based morning workshop! You'll be armed with information, knowledge, and tools to break out of the boring eLearning mold. Be prepared to interact, engage, and get involved in activities that will help motivate you and your learners!

Lunch Session – SAM in Action: Real Life Stories

Let's do lunch! Clients who have worked with Allen Interactions will share their experiences of creating engaging learning utilizing their CCAF-based design principles and the SAM process. This will be a unique opportunity for all attendees to benefit from real and recent experiences. Afterwards, you'll be able to pick their brains and hear clients talk candidly about what it's like to work through actual project constraints and conditions.

Afternoon Session – SAM in the Afternoon

It's important to use a process honed to produce the kind of product you want. It must also recognize and meet needs for communication, coordination, and practicalities while efficiently producing high impact learning experiences. Learn how SAM meets all these requirements from people who use it on a daily basis. This hands-on afternoon session is all about getting the creative juices flowing, so you'll learn techniques and best practices in the art of brainstorming and sketching. Fully immerse yourself in the process by learning to throw thoughts out, start over, and abandon ideas – all while getting valuable and constructive feedback that will evolve your project into a creative and profound learning experience.

"Good learning experiences aren't just about facts, they are about becoming a more proficient, capable, and valuable person."

– *Michael Allen*

Also see these sessions as part of an Online Learning Conference registration.

101 5 Advantages of SAM Over ADDIE
Michael Allen, CEO, Allen Interactions

201 Designing eLearning Interactivity–5 Steps to More Meaningful Context
Ethan Edwards, Chief Instructional Strategist, Allen Interactions

301 How to Align Gaming To Your Instructional Design Needs
Angel Green, Senior Instructional Strategist, Allen Interactions

401 Take Your Content Mobile with ZebraZapps!
Christopher Allen, ZebraZapps Product Manager, Allen Interactions

501 Discover How to Build Serious eLearning Games with ZebraZapps
Steve Lee, Co-founder, Allen Interactions

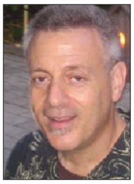
601 Getting Serious About eLearning
Michael Allen, Chairman & CEO, Allen Interactions; Julie Dirksen, Author, *Design for How People Learn;* Clark Quinn, Learning Technology Strategist, Quinnovation; Will Thalheimer, Learning-and-Performance Consultant, Work-Learning Research, Inc.

Co-Located Events

HIGHER·ED SYMPOSIUM

MONDAY, SEPTEMBER 22 8:30 AM – 3:30 PM $395 (includes lunch)

Although many of the tools might be the same, designing, developing, and administering online learning programs in higher education differs from those developed for training and development. *Training* magazine's first-annual Higher Ed Symposium explores these differences.



Facilitated by Saul Carliner, Research Director, Lakewood Media Group and Associate Professor, Concordia University, Montreal

Seven Unique Issues Affecting Online Learning in Higher Education

The Symposium starts with an interactive activity that provides a common base of understanding among participants.

A Showcase of Possibilities for Online Learning in Higher Education

Hear several case studies of online learning programs from other higher education institutions, including all-online and blended programs and credit- and non-credit courses on a wide range of topics.

Integrating Digital Resources into Courses

Expand the possibilities for your online and blended courses by integrating digital resources. This discussion identifies the classes of resources available – including e-books, e-journals, and third-party videos and games – and suggests practical issues to consider when integrating these resources into your courses.

Facilitated by: Irene Knokh, Instructional Design Consultant, University of Michigan Health System

Tips for Blending Courses

You'll explore challenges in providing blended and hybrid courses such as: what to put online and what to leave in the classroom, how to weave the two components, and how to ensure that learners know where to find which kinds of materials.

Facilitated by: Timothy Brannan, Professor, Central Michigan University

Using Technology to Support the Student Experience

Although most discussions of online learning focus on its role in instruction, technology can also play a significant role in supporting the student experience by providing access to resources for advising, professional skills development, and meetings with fellow students. This discussion explores specific ways you can use technology to enhance the student experience at your institution.

Facilitated by: Eric Krause, Vice-Provost and Dean of The Graduate School, University of Maryland University College

Assuring the Integrity of Online Tests and Assignments

How do you assure that the work students submit was actually prepared by that student? This discussion identifies some of the most common issues with the integrity of tests and assignments and demonstrates technologies that can help ensure that the student who submits work actually performed it.

Facilitated by: Steve Lesser, Vice-President, Software Secure, Inc.

Eight Things to Consider When Administering Online and Blended Courses

Although online and blended courses are intended to provide flexibility and expand learning options, they also create new logistical challenges. This session identifies the most common of these challenges, suggests ways to alert faculty to these issues, and provides strategies for addressing these issues.

Facilitated by: Diana Moore, President, Mortec Solutions Inc

Copyrights

One of the touchiest issues with online learning in higher education is copyrights. Copyrights specifically pose two classes of challenges: acquiring copyrights to courses to be taught online in the university and using copyrighted materials within online and blended courses. This discussion maps out the issues and suggests options available for addressing each.

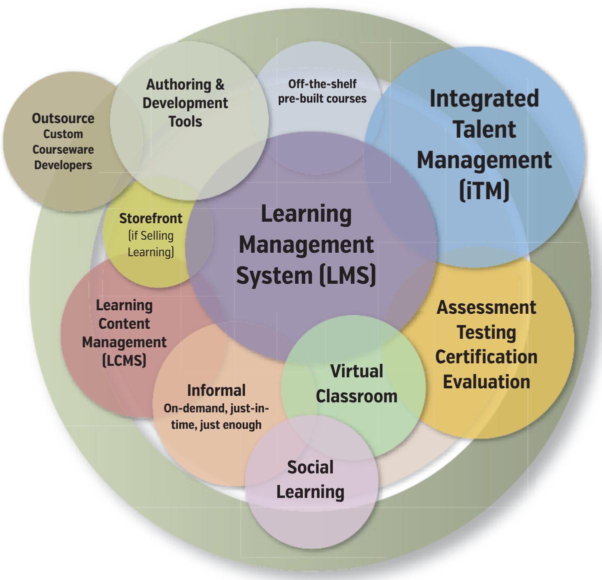
Facilitated by: Saul Carliner

Where Is Online Learning Headed in Higher Education?

MOOCs. Big data. Mobile technology. Following developments in online learning is a bit like following developments in fashion: some trends are short-lived, others have long lives. In this discussion, experts on technology in higher education assess the current trends and anticipate some that might arise in the next few years so you can make the most effective choices for technology in your institution.

Facilitated by: Diane Gayeski, Dean, Roy H. Park School of Communications, Ithaca College

training TOP 125 technology think tank



MONDAY, SEPTEMBER 22 8:30 AM – 3:30 PM $395 (includes lunch)

Attendance at *Training* magazine's inaugural Top 125 Training Technology Think Tank is limited to participants from current and past Top 125 companies – representatives who manage and/or drive organizational learning technology strategy including: chief learning officers, learning technology managers, learning solution architects, and learning development managers.

Facilitated by Bryan Chapman, Chief Learning Strategist/Learning Industry Analyst, The Chapman Alliance

Network, Brainstorm, Benchmark with Your Fellow Top 125ers

- Benchmark Current Top 125 Technology Usage
- Interactive Exchange: Challenges and Concerns, Best Practices, Innovative Projects, Emerging Technologies Under Consideration
- Explore the Learning Ecosystem
- Deep Dives: Innovations in Single-Source Content Development and integration of Social, Informal (Performance Support) and Mobile Learning.

Don't miss this chance to tech-connect with your peers and position your organization on the cutting edge of training technology!

CONFERENCE HIGHNOTES: Connect More

Cold. Mechanical. Borinnnggg. Whether a Webinar, computer-based module, or video, online learning often gets a bad rap. Why? Because it's missing the connection to learners. It's missing the story, the reason why. We laugh. We cry. We feel. And we remember. Our HighNoters (we call them that because they are going to help us take online learning to the next level) understand both the power of emotion and the thrill of technology. And they'll show us how to marry the two in a way that will knock learners' socks off — and keep them coming back for more!

Inside Pixar's Storytelling *and* **How to Steal Like an Artist**

The Vision

Michael Allen has been a pioneer in the eLearning industry since 1975, creating mega-successful authoring tool Authorware and serving as director of advanced educational systems research and development of Control Data Corporation's PLATO computer-based education system. For decades, Allen has concentrated on defining unique methods of instructional design and development that provide meaningful and memorable learning experiences through "true" cognitive interactivity. These methods have been the cornerstone of Allen Interactions' award-winning custom learning solutions for twenty years. He'll update you on the progress and importance of the recent Serious eLearning Manifesto (http://elearningmanifesto.org/read-the-manifesto) whose principles aim to elevate eLearning to the height of its promise.

The revolution has begun!

The Story

A Los Angeles freelance director and story artist, Emma Coats has directed several indie films, contributed as story artist to Pixar films *Brave* and *Monsters University* and DreamWorks Animation TV show *How to Train Your Dragon*, and storyboarded on Coca-Cola's *The Polar Bears* short film project. While at Pixar, Coats tweeted out a series of 22 Story Basics, a mix of things she learned from writers and directors at Pixar, and via trial and error in the making of her own films. A huge hit online, this list of tips for storytelling, is applicable to anyone in the business of communicating. A sample: Rule No. 14 says: Why must you tell this story? What's the belief burning within you that your story feeds off of?

That's the heart of it!

The Know-How

Cathy Moore is a passionate advocate for improving business performance by respecting and challenging people. She's also an instructional designer dedicated to saving the world from boring instruction. Discover how a few powerful questions and a simple flowchart can break your stakeholders' obsession with information and free you to design challenging, activity-rich eLearning. Learn how the process helps you tie a training request to what's actually important to your organization; quickly analyze the problem to find the best solutions; and create targeted, smart online activities that change performance.

Think Action Mapping on steroids!

The Creative Sauce

One-time librarian, Web designer, and advertising copywriter, Austin Kleon is the *New York Times* bestselling author of three illustrated books: "Steal Like an Artist" is a manifesto for creativity in the digital age; "Show Your Work!" is a guide to sharing creativity and getting discovered; and "Newspaper Blackout" is a collection of poetry made by redacting words from newspaper articles with a permanent marker. *New York* Magazine labeled his work "brilliant," while *The Atlantic* called him "positively one of the most interesting people on the Internet." Kleon believes creativity is for everyone. His creative truth: Nothing is original, so embrace influence and collect ideas, then remix and reimagine them to discover your own path.

It's the art of the steal!

Hands-On Clinics

WEDNESDAY, SEPTEMBER 24 2:15 PM – 4:45 PM

Learn by doing in these hands-on, interactive sessions that are included with your conference registration. Choose from one of 8 clinics.

Pre-registration requested, space is limited.

C01 Using Social Media for Learning

Jane Bozarth, *Author,*
Social Media for Trainers

Practice using social media tools to support and extend learning. You'll engage in activities such as openers, introductions, quick-answer, reflective work, group work, quiz games, and photo-based work. Bozarth will extend the discussion beyond the bounds of traditional T&D practice to the realm of informal and social learning. Participants will take away supplemental guidelines for supporting change and contributing to conversations regarding governance. You'll:

- Engage in supporting learning with social-media based tasks and activities.
- Develop a plan for incorporating new ideas into practice.
- Choose tools and approaches that support instructional goals.

Prerequisites: Some experience commenting on blogs or sites like LinkedIn, posting to Facebook, participating in online communities, or using similar tools. Work in an environment where some social media use is permitted.

LAPTOP REQUIRED: Please bring a WiFi-enabled laptop with security configured to allow access to popular sites like Twitter and Facebook.

C02 Designing eLearning for Mobile

Nick Floro, *Learning Architect, Sealworks Interactive Studios;* ***Jason Bickle,*** *Manager Instructional Design & Development, Experlogix, Inc.*

Creating a mobile learning course isn't just about wrapping your content and pushing it to the learner. With all the considerations to be made in starting an mLearning program, how do you know where to start? You'll learn about:

- Basic Mobile Architecture & Instructional Design.
- Planning & Prototyping Your Concept.
- Understanding App vs. Web Delivery.
- Understand a Basic Mobile Template & HTML5 Basics.
- Mobile Interface/Graphics – Model Building, Tools and Tips.
- Media – Optimizing Video and Audio for Mobile Delivery.
- Methods and tools to build your first mobile course.

LAPTOP REQUIRED: Please bring a WiFi-enabled laptop with Adobe Acrobat Pro trial or full version installed, Dreamweaver trial or full version installed and the ability to access email.

C03 Using Brain Science to Improve Learning Design

Art Kohn, *President, AKLearning*

Join neuropsychologist Art Kohn and explore how the brain controls learning and memory and how to apply this knowledge to create engaging eLearning. Come prepared to have fun and learn to:

- Understand how the brain uses metaphor and emotion in the encoding process.
- Develop incentive systems based on established principles of conditioning that reinforce desired behaviors.
- Improve attention span by understanding the secrets to levels of consciousness.
- Design effective "follow-up training" by tapping into mnemonic principles of memory.
- Improve long-term retention by understanding the connectionist model of memory.

C04 Intermediate to Advanced Storyline Techniques

Kevin Thorn, *Owner, NuggetHead Studioz*

In this clinic, you'll look at some intermediate and advanced Storyline techniques. You'll design and develop custom interactions, dynamic light-box screens, build multiple feedback options for quizzes other than just correct and incorrect, and custom drag-n-drop interactions. You'll dive into variables and how to leverage them for turning objects "on" and "off" and demonstrate cumulative scoring techniques. Along the way, you'll learn how to create all of these as re-usable templates so they'll always be available when you start a new project! You'll:

- Learn intermediate to advanced techniques involving states, layers, and triggers.
- Gain a solid understanding of Boolean, text, and numerical variables.
- Build custom interactions from a blank stage.

LAPTOP REQUIRED: Please bring a WiFi-enabled laptop with Storyline (or a 30-day trial version) already installed.

C05 eLearning Maker Faire: Create Cool eLearning Take-Aways

Karl Kapp, *Professor, Bloomsburg University*

In this unique Marker Faire clinic, you'll have the hands-on experience of creating small pieces that can be used in larger eLearning programs. You will get to create a small whiteboard video in less than 10 minutes, create a high-end PowerPoint Animation and develop a talking character, plus create a three question game, and much more. In this clinic, you will move from station to station making really interesting and fun elements in almost no time. You'll receive a jump drive and savable, executable files that you can take home to insert into your own eLearning or use to generate more ideas. This interactive, hands-on session will provide plenty of ideas and techniques and just enough digital and physical take-aways to make your training engaging and interactive.

C06 Project Scheduling Lab

Lou Russell, *Queen, Russell Martin & Associates*

Do you struggle with projects that never end? Customers who come up with lots of changes and new ideas right when you're supposed to be moving to another project? Bring your REAL project to this lab, and leave with a High Level Project Schedule. Learn how to work back from a fixed date, negotiate between multiple stakeholders and identify the best use of limited time and resources. Learn to:

- Visually document the key stakeholders, deliverables, risks, governance, objectives and constraints for a project in less than an hour.
- Identify the key milestones of a project leveraging best practices and research on percentage of time spend on each.
- Implement 'bad news early is good news' to end projects well.
- Move projects to completion more effectively.

Each participant will receive templates for both a Project Charter and a Project Schedule.

C07 Story-Based Learning Lab

Ray Jimenez, *Learning Architect, Vignettes Learning;* ***Diane Senffner,*** *CEO, Cine Learning Productions;* ***Sivasailam Thiagarajan, RMS, The Thiagi Group;*** ***Scott McCormick,*** *Co-founder, Float Mobile Learning;* ***Shawn Scivally,*** *Co-founder, eLearning Brothers*

First- and second-generation eLearning has been the cause of much frustration and waste because the design did not provide immediate usefulness, engagement and context. Today, there is a renewed interest in using stories and context in eLearning design and development. In this lab, you'll see powerful examples of story-based learning and get tips and techniques for using stories in serious games; scenarios; social learning; experience sharing; virtual and on-demand learning; mobile learning; instructor-led training; and performance support. Attend and get a step-by-step process in applying stories and context design.

Watch for a series of free pre-event Training Magazine Network webinars relating to this Lab and Stories for eLearning Resource Site with demos, examples, and reference materials to go live in July at ***http://storylab.storyls.com/***

C08 Selecting Your Development Tool: Let Your Content Drive Decisions

Danielle Watkins, *Principal, Chief Learning Officer, Zenith Performance Solutions*

Articulate Studio, Articulate Storyline, Captivate, Lectora, Camtasia, Adobe Flash, Adobe Edge Animate...what tool should you buy to develop your eLearning? Choosing a development tool should be driven by the type of content you will produce – that is ALL content being developed (which is rarely considered). Instead, organizations often go with what they have heard is a great tool, without fully evaluating if the tool makes sense for their particular initiatives. This session will provide you with a hands-on evaluation of your content, review of the most popular tools on the market, the features of each, and use of a checklist to help you decide which tool is right for your eLearning development. Learn to focus on letting your content drive the tool, not the other way around – and to do so with a budget in mind. Learn to:

- Define the uniqueness of your eLearning content.
- Compare and contrast different tools on the market.
- Analyze which tool is right for you.

LAPTOP RECOMMENDED: Please bring a WiFi-enabled laptop with sample content.

Take A Field Trip to Learn How the Best Do It!

THURSDAY, SEPTEMBER 25 $50 EACH

Tours are for Conference attendees. Space is limited. Pre-registration is required; fee is non-refundable.

McDonald's Hamburger University Tour: Design and Development

8:00 AM – 12:00 PM

See the training facility of one of *Training's* Top 125 and Learning Elite's top ranked companies — McDonald's Hamburger University! The tour will include a rich history of McDonald's, the brand, and of course the training organization. Learn how McDonald's USA designs, develops, and delivers training to over 14,000 locations across the country every day. Highlights will include a look inside our "smart" classrooms, virtual collaboration booths, and our restaurant laboratory where we deliver hands-on training to our managers in a full size replica of a McDonald's kitchen — including the Drive-Thru.

Ace Hardware Tour: Inside the Training Store

8:00 AM – 12:00 PM

Tour Ace Hardware's Woodridge Facility, a model replica of the perfect Ace Hardware store. This not-open-to-the-public facility is used for training on a variety of topics including merchandising, optimizing the store layout, assortment and new plan-o-gram development. Additionally, this store environment is used as the "filming set" for eLearning modules featured in Ace Certified Helpful programs. Along with the guided tour, presentations will be given by Ace experts on how the Woodridge Facility is used to train and improve stores across the Ace Hardware organization.

Naval Stations Great Lakes Tour: World-Class Training and Simulations

6:00 AM* – 11:30 AM

Recruit Training Command, the Navy's only boot camp, is a state-of-the-art, world-class training environment. You will see first-hand how the Navy transforms civilians into Sailors using blended learning comprised of classroom, hands on, simulation and computer-based training to instill in Sailors the core competencies of antiterrorism and force protection and damage control. Your tour will include:

- Battle Stations 21 (BS-21) – the Navy's largest training simulator using special effects technology to simulate shipboard emergencies as a capstone test of the recruits' skills and teamwork.
- Recruit "Ships" – the barracks that hold up to 12 divisions of more than 1,000 recruits, set up with many of the same shipboard amenities such as crew compartments, laundry facilities, classrooms and galley.

**Includes continental breakfast.*

Breakout Sessions

Choose from one session in each time block. See the schedule online to sort by content.

TUESDAY, SEPTEMBER 23
8:00 AM – 9:00 AM

101 Five Advantages of SAM over ADDIE

Michael Allen, CEO, Allen Interactions

Analysis, design, development, implementation, and evaluation – ADDIE – are all important steps in the design of effective eLearning applications or any learning program. While there have been many adaptations of ADDIE, today's tools, challenges, and opportunities suggest further revision or an alternate process altogether. More efficient and effective processes are indeed proving to produce superior learning experiences in less time. Based on the bestseller *Leaving ADDIE for SAM*, this session describes an iterative model, the Successive Approximation Model (SAM), and will cover the five advantages this next-generation agile approach has over ADDIE for producing the best learning experiences possible.

102 Let's Get Real About Selecting an LMS

Jennifer De Vries, President, BlueStreak Learning, LLC

On a scale of one to five, most eLearning professionals rate their LMS as a 2.6. At any given time, over 50% of LMS owners will say that they are somewhat or very dissatisfied with their LMS. So, why is there so much dissatisfaction with these business critical systems? And how can you be sure this doesn't happen to you? This session reveals the primary reason for dissatisfaction, and you'll get advice about how to have the best chances of satisfaction when purchasing an LMS. Explore requirements that need to be documented before selecting an LMS and a process for selecting an appropriate LMS.

103 Virtual Training Implementations: Three Things You Must Do For Success

Cindy Huggett, Consultant, Cindy Huggett Consulting

When rolling out live online training to your workforce, what needs to happen to ensure it goes smoothly? This session will cover the three key steps every organization should follow in a virtual training implementation. It will provide practical examples from organizations who have successfully implemented live online training, along with specific tips for success. Whether it's a complex blended learning program for a large global audience or only a single synchronous session, proper preparation is essential. You'll learn to prepare your participants, your facilitators, and your technology. And, you'll get equipped with checklists and guidelines that you can put to immediate use.

104 The Coolest Adobe Captivate Tips on the Planet

Joe Ganci, Owner, eLearning Joe

Too many Adobe Captivate features are hidden and not well known. Using the layers of sophistication of these features means you will save a lot of time, deliver more engaging and personalized learning, and be able to tap into external resources more easily. Ganci will show you some of the Captivate features you need to make the most of this powerful tool, including how combining the use of variables, Advanced Actions, and effects will result in a useful example that you couldn't create otherwise. Learn to maintain your lessons now and in the future, take advantage of little-known features, and run rings around your Captivate friends!

105 An Overview of Online Learning

Saul Carliner, Author, e-Learning Handbook

New to online learning? This session provides a high-level overview of the possibilities for teaching with online, and introduces and defines the different classes of technology used in online learning. You'll:

- Identify four types of learning you can accommodate online (such as training and performance support).
- Describe the technologies used to develop, deliver, and manage courses.
- Participate as fully as possible in the rest of the sessions at this conference.

We Want Your Ttvs!

(See page 3.)

Breakout Sessions

106 Top 125 Panel: Keys to Creating World-Class Informal Learning and Performance Support

Bryan Chapman, Chief Learning Strategist, Chapman Alliance; Panelists TBA

For this panel, *Training* invited leading providers of authoring and content management technologies that are used to create informal learning and performance support at *Training* Top 125 companies. Come join in a deep-dive discussion on topics including moving learning closer to the point of performance, use of learning content management technology, creative use of knowledge bases, measuring the use of informal learning (without turning it into formal learning), modularizing content for optimal use, socializing learning content, content curation to avoid information overload, and balancing user-generated content with expert-developed content.

107 Designing Tangibility in Communities of Practice: Key to Success

Arun Prakash, Executive Vice President; Sonia Wadhwa, Chief Operating Officer, InfoPro Learning, Inc.

There are broadly three goals that Communities of Practice (COPs) help achieve: improvement of a business unit's efficiency by reusing and improving existing knowledge and best practices; to encourage innovation within units by increasing the sharing of best practices; to increase employee satisfaction by encouraging participation in a network as an opportunity to improve competencies within their unit. How to measure the effectiveness of COPs? How to design tangibility in COPs? Learn how to design tangibility by implementing the right measurements at four key levels of COPs: Community, Domain, Practice and Roles & Goals of Members.

108 Remote Proctoring: A Technology-Driven Approach

Steve Lesser, VP, Software Secure

Learn how remote proctoring can make your organization more efficient, your test takers more productive, and ensure your tests are completed with more integrity. You'll see examples of effective approaches for securing remote test-taking environments to meet the demands of corporations and certification organizations by allowing the test takers access to the exams from any place, at any time. You'll explore data that illustrates how remote monitoring is working in these organizations and examples of how cheating was prevented or caught.

9:15 AM – 10:15 AM

201 Designing eLearning Interactivity – Five Steps to More Meaningful Context

Ethan Edwards, Chief Instructional Strategist, Allen Interactions

A common shortcoming with eLearning is that learners fail to connect with the content. There are many contributing factors to this problem, but chief among them is that many lessons fail to adequately create meaningful and relevant context. Context, when integrated with Allen Interactions' CCAF-based Design Model consisting of Challenge, Activity, and Feedback, can create powerful instructional interactivity. This session will present some straightforward design strategies that focus on designing activities which result in appropriate contexts for your desired outcomes. Real-world finished eLearning lessons will illustrate these principles.

202 Don't "Waste"! Agile Project Management & the Eight Wastes of Lean

Megan Torrance, Chief Energy Officer, TorranceLearning

You'll get a quick introduction to Agile project management techniques and then get right to the Eight Wastes of Lean. A "waste" is anything you do that does not add value to the customer. Manufacturing and healthcare industries are using Lean to improve their processes, specifically to preserve value while doing less (meaningless) work. Explore how to apply these principles to improve your project management and deliver better results more efficiently for the audiences you serve. Learn to hone your use of Agile tools and techniques for estimating, planning, and managing a project while delivering results with less waste.

203 Management's Real ROI: Capitalizing eLearning Investments

Ajay Pangarkar, Performance Strategist, CentralKnowledge Inc.

Training efforts are often viewed by management as a line expense for a specific period. Rarely is any type of training activity considered an investment apart from specific tangible elements. eLearning initiatives, however, are considered investments since they require tangible financial requirements including technology and supporting infrastructure viewed as "capital expenditures." Learn about financial literacy tools used to build a comprehensive financial structure to support your eLearning projects and to gain senior management buy-in.

204 Using the Tin Can API to Connect Learning to Work

Tim Martin, Partner, Rustici Software

See how the new Tin Can API (aka Experience API) has been implemented in different organizations through an exploration of real-world case studies. Learn how the API furthers your ability to collect learning activities and express real-world experiences – and how to connect actions to outcomes and performance support. Learn to imagine new experiences for learning that go far beyond the traditional and see how to make those experiences actionable and trackable. Compare how different organizations have implemented Tin Can to match specific objectives.

205 Ace Hardware's Training Transformation Story

Jo-Ann Kratz, Retail Training Manager; Jay Heubner, Director of Retail Training and Development, Ace Hardware

When's the last time you heard 200,000 people agree that your training was highly effective? Well, at Ace Hardware, they heard exactly that! Many eLearning curricula provide some combination of reinforcement, good instructional quality, coaching, innovative technology, behavioral objectives, behavioral modeling, video, simulation, games or certification. However, very few have all of these instructional design strategies rolled into one. Hear the compelling story of how Ace Hardware changed the expectations around training in a co-op retail environment that resulted in significant ROI.

206 10 Virtual Classroom Pitfalls: Avoiding the Common Traps

Annamarie Lang, Senior Consultant and Virtual Classroom Product Manager, Development Dimensions International

You've mastered traditional classroom delivery but have recently been asked to implement a virtual learning program. Are you ready, or are you susceptible to the 10 most common pitfalls when delivering virtual classroom? Don't fall victim. As the session begins, you'll complete an 11-question Virtual Classroom Readiness Assessment to see how susceptible to pitfalls you may be. Then you'll identify the challenges that can complicate and cause setbacks to the way you approach virtual learning. You'll walk away with ideas and guidance to implement a virtual learning program without falling victim to the common pitfalls.

207 Top 125 Panel: Best Practices When Connecting Learning and Performance

Bryan Chapman, Chief Learning Strategist, Chapman Alliance; Panelists TBA

Come join in a lively discussion with visionaries, representing the most widely used technologies at *Training* Top 125 companies – including LMS and integrated Talent Management System providers. Top 125 winners are asked to share solid "results" about innovative learning initiatives. This often goes well beyond just tracking course completions. The secret is upping the game by connecting learning to performance. You'll explore best practices such as blending learning with action, mixing in coaching/mentoring, leveraging learning communities, linking learning and "actual" performance data, dynamic delivery based on user job/role/function, enhancing assessment with performance-based testing, and managing long-term certification projects (a combination of things that happen during learning and well outside the LMS environment).

208 Online Sims Made Easy and Affordable

Tammy Berman, Senior Vice President of Design, Socratic Arts

Some organizations do not employ simulations because of the perceived difficulty of developing, delivering, and managing them, especially online. Learn to develop online simulations cost effectively, and with ease. You will explore a Story-Centered Curriculum Authoring Tool, designed to help course developers situate the learning of skills and supporting concepts through relevant, realistic tasks, using a pedagogical approach supported by cognitive science research. These human-mentored simulations feature user-friendly, online, scenario-based learning with accessible, just-in-time learning support and reflection, and mentor support.

1:00 PM – 2:00 PM

301 How to Align Gaming to Your Instructional Design Needs

Angel Green, Senior Instructional Strategist, Allen Interactions

Does gamification of eLearning even make sense for your organization or the needs of your learners? Explore Allen Interactions' Seven Magic Keys and CCAF (Context, Challenge, Activity, Feedback)-based Design. Learn how to avoid gaming just for the sake of gaming, and truly align gaming to your instructional needs through the examination of real-world eLearning examples and their game design elements. Green will also provide a sneak peek to Allen Interactions' Taxonomy Alignment for Gaming (TAG).

302 Unflappable Approaches to Reinforce Online Training Outcomes

Kendra Lee, President, KLA Group

By mixing in a blended training approach you can cement the learning, ensuring critical business values, concepts, and knowledge will be reinforced. But how do these delivery approaches delivered at tactical times transform the learners into 'doers'? Discover the 4 critical elements to integrate blended training that cements learning and strategies to motivate all levels of employees to reinforce key behaviors and knowledge. You will create a strategic training schedule timeline that integrates blended learning delivery with the critical reinforcing elements.

Breakout Sessions

303 Four-Door Approach to Rapid eLearning

Sivasailam Thiagarajan, Author, More Jolts! Activities to Wake Up and Engage Your Participants

Conventional wisdom suggests that you can have only two of these three outcomes in eLearning design: speed, low cost, and effectiveness. Learn how you can have all three by using the four-door design approach. See how this flexible approach treats adults as competent learners and avoids patronizing and distracting them with bells and whistles. Explore how the approach empowers the learners to control the scope and the sequence of learning activities to better suit their individual learning preferences.

304 Putting Out Fires: Modifying Others' eLearning Courses

Jennifer De Vries, President, BlueStreak Learning, LLC; Joe Ganci, Owner, eLearning

Have you been asked to make revisions to an existing eLearning course that someone else developed? Making modifications can create new problems. In this session, you'll explore several case studies where an expert eLearning developer was asked to revise or fix someone else's Articulate and Captivate files. De Vries and Ganci will discuss the questions to ask and demonstrate the steps to take before revising someone else's eLearning course. Learn 10 questions to ask before modifying someone else's eLearning project.

305 Build Learning Support Web Apps Without Being a Programmer

Jeff Batt, Product Development Manager, eLearning Brothers

Not a programmer? Not a problem. Learn how to create and publish dynamic learning support web apps for desktop and mobile devices that meet the latest web standards – without writing a single line of code – with Adobe Muse. Learn to:

- Build different layouts for desktop, tablets and phones.
- Build interactive light boxes for image viewing.
- Build other interactive content such as menus, accordions, tabbed panels, slideshows and more.
- Publish your web app.

306 eLearning: Writing Effective Scripts and Creating Storyboards

Jennie Ruby, Instructor, IconLogic

Congratulations! You've been selected to write the user manual for your company's next big software release. And following that, you've been invited to write the script for the company's Employee Benefits portal and eLearning lessons. What's that you say? It's been a while since you had to write at such a granular level? Maybe you think your writing could be better? Or perhaps, like many tasked with writing training materials and scripts or user documentation, writing qualifies as "other duties as assigned." Learn to create clear, concise step-by-step instructions that can become part of effective documentation, printed instructions, or eLearning scripts.

307 Top 125 Panel: Analytics: The Holy Grail

Bryan Chapman, Chief Learning Strategist, Chapman Alliance; Panelists TBA

According to IDC, organizations are currently collecting 300% more data today than they did just two years ago. During this panel discussion you'll engage in an information exchange with technology providers to the *Training* Top 125 exploring best practices for turning data into action, connecting data inside the learning infrastructure, creative use of dashboard visualizations, meaningful mash-ups of learning/performance data with company key metrics, analytics as a key to gamification, the future data standards such as Experience API (Tin Can), OData, etc.; and where the whole learning analytics movement is heading next.

308 What Is Your LMS' Status?

Brandon Williams, Consultant, The Educe Group

You have an LMS. You invested time, money, and effort implementing this system. Moreover, you have maintained the LMS through multiple integrations, customizations and maybe even a costly upgrade or two. Now you must determine the best way to deal with the onslaught of collaborative technologies. It seems the LMS has begun to take a back seat to social learning technologies. Is the LMS going the way of the compact disc, or is there room for it in the new world? This session will explore the future of your LMS and review how to keep it linked to your long-term learning strategy ensuring countless hours and dollars won't be wasted in the wave of new technology.

2:15 PM – 3:15 PM

401 Take Your Content Mobile with ZebraZapps!

Christopher Allen, ZebraZapps Product Manager, Allen Interactions

Learn how to create ZebraZapps mobile apps that download directly to your learners' devices! Lose Internet? No problem. Thanks to TinCan and the Experience API, once an app is on the device, students can take lessons even if they briefly lose Internet connection. Progress will still be tracked and reported as soon as they are reconnected. Learn the steps to publish any ZebraZapps app for mobile, including:

- Setting up a free LRS and configuring a ZebraZapps project to communicate with the LRS via TinCan.
- Creating a ZebraZapps project that is designed to play on mobile (input and output settings).

402 Compressing Audio & Video for Desktop and Mobile Delivery

Nick Floro, Learning Architect, Sealworks Interactive Studios

This session will provide an overview with everything you need to know about editing, preparing and delivering the highest quality video and audio to your users. You'll discuss techniques and interactivity that can be added as well as the latest standards and how you can take advantage of open source, free compression tools, and the latest applications for getting the smallest file sizes and the highest quality. You'll also discuss the hardware and software that is needed to create your own in-house studio and for green screening speakers for under $1,500.

403 Show Your Work

Jane Bozarth, Author, Show Your Work: The Payoffs and How-Tos of Working Out Loud

We learn by doing, and by telling what we're doing, and by watching others do things, and by showing others how we did something. Narrating work can solve so many problems for organizations, from capturing tacit knowledge, to easing transitions when workers depart, to further enabling informal and social learning. How can we help it happen? Learn to:

- Give several examples of what to narrate, including at least one from your own practice.
- Identify ways of capturing narration, including at least one non-text-based.
- Establish a plan for piloting a work-narration project back on the job.

404 Creating the Need to Know: Using Technology to Drive Learner Responsibility

Jason Bickle, Manager ID & Development, Experlogix, Inc.

What if we had no graphics? What if there was no audio or video? Would our online learners learn? As technology is changing, the way we think about teaching and learning online is evolving. Come discover how to improve cognitive engagement, create the need to know, and motivate learners to take responsibility for the learning process. You will accomplish this through discussion of learner challenges, mysteries, and games to ignite the need to know. Learners will be driven to find the information at their fingertips, and as a result increase retention.

405 No, Everything Doesn't Transfer Online

Melissa Smith and Maria Chilcote; Managing Partners, The Training Clinic

In an age where our C-execs want everything cheaper, faster and yesterday, we need to do some explaining when the go-to solution to training is, "Just throw it online." Whether you conduct synchronous or asynchronous training or both, you'll get tools and techniques to maximize your learners' online experience. Start with a contextual analysis to be sure you have selected the best delivery medium. Then identify what transfers effectively and add in those classroom facilitation skills that need to be tweaked to provide an engaging online learning experience. Oh, and we've thrown in an assessment, too, to identify your facilitator style preference!

406 Learner Engagement in the Virtual Classroom

Greg Owen-Boger, Vice President, Turpin Communication; Dana Peters, CEO, Mondo Learning Solutions

How can we increase the level of learner engagement in our virtual instructor-led training classes? The solution isn't simply to improve our own skills, but to also influence and coach the other stakeholders contributing to the session. Learn to:

- Identify the roles and respect differing perspectives of all the stakeholders including the facilitator, moderator/host, instructional designer, graphic designer, and learner.
- Coach each stakeholder to build on their inherent strengths.

407 Constructive Failure: How Game Players Learn by Losing

Dov Jacobson, Managing Director, GamesThatWork

Games differ from traditional learning media because they encourage failure. In a game, as in life, you can learn much more by losing than by winning. But it is never that simple. Losing is too often a crushing defeat, and you learn helplessness. We don't want that. We want you to be challenged to seek mastery. This session explores the principles of constructive failure. You'll establish the difference between learned helplessness and the mastery response. Then review experimental research that seeks the causes of this difference. You'll develop principles from this research and a design rubric from the principles. Using a fictional learning game, you'll see how each element in the rubric might be applied to its design. Finally, you'll graph player data produced by an actual game.

Breakout Sessions

408 Teaching in the Clouds with Your Feet on the Ground

Laurie Burruss, Professor, Pasadena City College

More and more instructors and learners live somewhere between the cloud and the classroom. Explore how to create aggregated learning "playlists" and identify strategies for implementing cloud applications and tools that create personalized curriculum, programs, and projects for self-learning, hybrid or flipped classrooms, and online courses. Learn about: Evernote – the Personalized Student Digital Notebook; Learni.st – annotated URLs and learning documents; online libraries such as lynda.com; Wikispaces.org – the FREE LMS; MOOCs – Archived National Treasures in Education; and The 5-Finger Rule for Picking Your Tools.

WEDNESDAY, SEPTEMBER 24
8:00 AM – 9:00 AM

501 Discover How to Build Serious eLearning Games with ZebraZapps

Steve Lee, Co-founder, Allen Interactions

A "real" serious game must do more than just provide a fun way to memorize – it must foster a deeper learning experience through meaningful and memorable practice to mastery. Other tools might make it easy to build content into games like Jeopardy and Wheel of Fortune, but those are not authentic activities. To affect behavior and improve performance, activities must simulate the thought processes and motor skills required for on-the-job success. See how anyone, non-programmers included, can use ZebraZapps to quickly build REAL serious learning games that actually affect behavior and improve performance.

502 10 Pitfalls to Avoid When Engaging SMEs

Kendra Lee, President, KLA Group

Effectively engaging Subject Matter Experts (SMEs) in development and delivery will not only make your training resonate, it will also speed development time. But falling into these unexpected SME traps will cause your training program to quickly derail. Explore the 10 pitfalls you want to avoid when involving SMEs in training development and delivery. You'll learn indicators of the pitfalls, discover proven strategies to bring SMEs back on track, and techniques to avoid the pitfalls from the start of the project.

503 Getting Traditionalists to Learn Online

Chad Jackson, Director, Education Design and Research, American College of Chest Physicians; Jon Aleckson, CEO; Andy Hicken, Product Innovation Specialist, Web Courseworks

A common challenge for organizations moving to increasing use of online training is overcoming reluctance from learners and trainers accustomed to live training. This session will share success stories from organizations that have created paths to migrate learners and trainers from live to online instruction. You will learn strategies for planning, communicating, and promoting blended learning curricula that lead from face-to-face training to self-paced (asynchronous) eLearning, and explore ways to incorporate online instruction into face-to-face training using widely available technology.

504 Making eLearning Stick

Barbara Carnes, President, Carnes and Associates

You'll get the latest research on transfer of eLearning as well as specific techniques to use before, during, and afterward to maximize application. You will learn at least 10 Techniques to Integrate Education (TIEs) – research-tested techniques you can begin using immediately, with any training topic, to increase transfer to the job. And, you'll share best practices and lessons learned for increasing and enhancing training transfer in the courses you design, develop, and/or facilitate.

505 Guerilla Evaluation

Julie Dirksen, Author, Design for How People Learn

eLearning has a broken feedback loop, and it's holding us back as a field. Traditional evaluation at best is costly and difficult to measure, and at worst is ignored altogether, or implemented in such a superficial way that it's meaningless. In 1994, user experience expert Jakob Nielsen's article "Guerrilla HCI: Using Discount Usability Engineering to Penetrate the Intimidation Barrier," transformed the practice of software design. eLearning needs a similar toolset. Explore what you can learn from the field of software usability, and what practices you need to ensure successful eLearning design. Learn to recognize when you have a broken feedback loop and about specific, immediately applicable, inexpensive, and fast methods for rectifying it.

506 10 Essentials for Successful Mobile Learning Implementation 2014

Scott McCormick, Co-Founder, Float Mobile Learning

From strategy to concept to development to delivery, countless decisions need to be made to ensure a successful mLearning deployment. Learn about proven practices that will help you tackle mLearning initiatives head on. You'll delve into some critical and essential tasks that, when followed, greatly increase the potential for successful mobile learning. You will take a look at ten of these tasks and how they are utilized in real-world situations. Essentials covered include building a business case, choosing the right delivery, knowing good design, building a team, prototyping, and security.

507 Using PowerPoint as a Collaborative Authoring Tool

Sharon Link, CEO, Leadership Via Design

Explore the use of PowerPoint as an effective collaboration tool that can be used during online learning live sessions with collaborative learning groups. This interactive session will result in an artifact which will be your take away. Learn to:

- Identify the 5 ways PPT can be used to collaborate during online learning sessions.
- Create an example of a PPT Collaboration Artifact.
- Demonstrate and document the processes for using PPT as a collaboration tool.
- Work in collaborative teams to experience the learning.

508 Telling Stories, Getting Results: The Power of Storytelling in Video

Diane Senffner, CEO, Cine Learning Productions

Learn how to use video to help shed light on difficult concepts and soft skills. You'll explore powerful examples of how story-based video can enhance any curriculum. Examples will be given of stand-alone video learning and video as part of a blended approach. Learn how to wrap a story around content as well as tips and techniques for scripting a video production. You'll:

- Discover how to connect the audience and material through stories and narrative.
- Explore designing and scripting story-based video for all types of learning.

10:30 AM – 11:30 AM

601 Getting Serious About eLearning

Michael Allen, Chairman & CEO, Allen Interactions; Julie Dirksen, Author, Design for How People Learn; *Clark Quinn, Learning Technology Strategist, Quinnovation; Will Thalheimer, Learning-and-Performance Consultant, Work-Learning Research, Inc.*

Instead of deep and meaningful learning, most eLearning encourages individuals to stay away in droves, unless of course the training is mandatory (in which case learners cheat). Many developers and designers say they want to do better, but struggle to put that desire into practice. Something needs to change. Explore why the majority of eLearning efforts are failing, and how that relates to what is known about high-quality learning experiences. And learn about an initiative to help elevate the quality of eLearning across the industry: what it is, why it's important, and how you can participate in this effort to improve eLearning for us all.

602 Changing the Shape of the Forgetting Curve

Art Kohn, President, AKLearning

Every year companies invest about 60 billion dollars in training. Unfortunately, employees retain little and rarely express a measurable change in behavior. In fact, research shows that one hour after a training session, learners have forgotten about 50% of the information, and after one day, they have forgotten 70%. But there is hope. Neuroscientists have developed a series of cognitive technologies that reinforce human memory and change the shape of the forgetting curve, known as the "retrieval practice effect." Using a series of demonstrations and activities, Kohn will illustrate ways that you can dramatically improve your own memory and your company's training programs.

603 Designing & Developing Learning Using HTML5

Nick Floro, Learning Architect, Sealworks Interactive Studios

You'll learn what you need to consider in designing content as well as get technical guidelines. Get an introduction to five hot features in HTML 5 that you can start using today, and prepare for developing with the new standards. Floro will introduce you to the seven challenges you need to know in order to make sure your first app or delivery is a success as well as whether to launch a native app or web app.

604 Communication Skills for the Virtual Workplace

David Maxfield, VP Research, VitalSmarts

13 out of 14 common workplace relationship problems occur far more frequently within "virtual teams" scattered across various geographies than within teams located in the same building. Maxfield will share the results of research conducted by VitalSmarts and *Training* magazine that explores the specific and most common communication breakdowns that occur in virtual workplaces, the drain these communication breakdowns pose to productivity, and the effect virtual communication has on teamwork and morale. He will also introduce positive deviants – successful virtual teams – and detail what they do to combat the inherent challenges in working across the digital divide.

Breakout Sessions

605 10 Things We Know about Designing Games for Learning from Research

Karl Kapp, Professor, Bloomsburg University

This decidedly nonacademic presentation provides a broad scientific overview of what we know from research about the effectiveness of games and game-elements to changing learner behaviors. You will examine 10 findings from research and see how those findings directly relate to the creation of instructional games, games that make an impact on learner behavior. And, yes, you will play a game in this session! Learn to apply:

- Three principles for adding game elements to online and stand up instruction.
- Four motivational aspects of games to improve learning recall and application.

606 9.5 Essential Development Tips to Become an eLearning Rockstar

Shawn Scivally, Co-founder, eLearning Brothers

In this session, you'll learn how to take your eLearning development to the next level. Brother Shawn walks you through the process of designing eLearning templates. Learn tips that save development time, help maintain branding standards, and make your courses look awesome!

607 The Visual Cortex: Simplified Visual Design for eLearning

Kevin Thorn, Owner, NuggetHead Studioz

The Visual Cortex is the area of the brain we use to process visual information. We can communicate an action or perceived affordance on a screen by applying simple visual techniques. Learn why "less is more" allows learners to use their imagination and experiences to complete the image or graphic and in turn results in higher retention. How much time do you spend hunting for images or that just right graphic? What if a few strokes of a pen or the arrangement of a few simple shapes could convey the same message more effectively? Learn how making subtle changes to your graphics can be a powerful companion to the instruction. And, get techniques for creating on-demand graphics following basic visual communication principles.

608 The Latest in Brain Science and the Next Generation of eLearning

Carol Leaman, CEO, Axonify

Scientists know more about the brain than ever before. Consumer brain training software designed to improve memory, attention, cognitive ability and more has hit the market with a vengeance. How is this same research set to change the world of corporate learning and eLearning? What does the next generation of eLearning look like? Armed with the latest research from the world renowned Rotman Research Institute, join Leaman to learn about:

- Three key areas of brain research that are expected to have the most impact on corporate eLearning.
- Real corporate examples of improvements in knowledge retention, learning transfer and the bottom-line.

1:00 PM – 2:00 PM

701 Tether Your Space Junk

Melissa Smith and Maria Chilcote; Managing Partners, The Training Clinic

Have TONS of asynchronous learning out there that no one's using? You're not alone. There's been a trend towards more is better. And so over the years, we have "stuffed" the clouds and taken a "build it and they will come" mentality. Unfortunately, "they" usually don't show up! Without the proper support system, all of our efforts are turning into virtual "space junk." Start at the beginning and determine if asynchronous learning is right for your learning situation. Learn the challenges (some you may already painfully know) and how to craft a support system that leads the learners to this mode of learning, facilitates their learning, and enables them to transfer this new knowledge back on the job.

702 Blended Virtual Facilitation and Simulations for Effective Onboarding

John Moxley, Director Cricket University, Cricket Communications; Nancy Munro, CEO, KnowledgeShift

Cricket Communications needed to come up with an innovative and cost-effective way of quickly onboarding about 100 new hires per week. To provide them with the basic knowledge and skills to properly provide a great customer experience, Cricket turned to a combination of highly interactive live webinars and virtual role-play simulations that cover the company, its products and services, and point of sales systems and processes. You'll:

- Understand the best practices each webinar facilitator uses.
- Determine whether or not using mobile role plays for virtual practice is an effective method of training for you.

703 Measuring the ROI in Online Learning

Jack Phillips, Chairman, ROI Institute

This session highlights how ROI has been adapted for processes in eLearning, mLearning and Blended Learning. And how with technological advances, we must adapt with it. Explore ROI studies based on "Measuring the Success of Technology Based Learning: A Step-by-Step Guide for Measuring Impact and ROI" and "Measuring ROI in Learning and Development: Case Studies from Global Organizations." Phillips will describe the application of ROI to a particular program, overcoming issues you might encounter, and the value of technology-based learning.

704 Creating an Integrated Learning Experience

Borys Zhalilo, Founder, Solutions2b LLC

It is time to make your training an Integrated Learning Experience – one that never stops. Whether online or in the classroom, learn to use support before, during and after to increase your training's effectiveness. You'll learn best practices for integrating social media, Google docs, blogs, video, SlideKlowd, emails and boosters into your training to keep your participants engaged and learning. You will benchmark and evaluate your traditional and online programs and will have a clear vision on how to transform them into Integrated Learning Experiences.

BYOD: Please bring your own Internet-enabled device (smartphone, tablet or notebook) to this session.

705 Interface Design for eLearning

Julie Dirksen, Author, Design for How People Learn

As the tools that support interactivity get better, eLearning designers will be making increasingly complex decisions about how to design their interfaces. Poorly designed interfaces can have a negative impact on learner retention and performance. A well-designed interface, however, reduces the cognitive load on learners, and allows them to focus more on the content being learned. Explore key principles of interface design, and how they can be applied to the design of learning interfaces. Learn about interface design dos and don'ts, and solutions to common design problems using case studies and specific examples.

706 Culture Eats Strategy for Breakfast – Creating Cultures of Online Learning Engagement

Nancy McMonigal, President, Locus; Gregg Fasbinder, COO, Sagatica

Creating a magnetic learning culture determines the makeup of each training environment and leads to exceeding learning outcomes. This session delivers ideas, tools, and a combined genius of years of experience (you, the participants). Working together to answer the question, "What does excellence in online learning look like?" you will emerge ready to navigate the path from where you are today to building a truly great learning experience. By mining the collective wisdom of experience with your respective colleagues, you'll create magnetic online learning environments using multiple methods of engagement including Socratic conversation and questioning.

707 Mix, Match, & Motivate: Increase Engagement and Recognize Success

Shauna Bona, Director of Curriculum Development and Delivery, O.C. Tanner; Quincy Gardner, Project Manager, Allen Communication

What role does recognition play in business success? Learn how one online learning program has been designed to teach managers to motivate and inspire employees through recognition. Discuss how to create a program that is immersive, surprising, experiential, on-brand and focused on achieving business goals. Lessons shared will include how we transformed the course from ILT into an online program designed to leverage rich content, media assets, and creativity. Learn how performance mapping reveals connections between desired training outcomes, learner behavior, training design strategies, and achieving business goals.

708 Game-Based, Gamification, Game Mechanics

Andrew Hughes, President, Designing Digitally, Inc.

Gamification is the integration of game mechanics, or game dynamics, into a learning experience, while game-based training can be defined as a game designed for the purpose of solving a problem. However, these words are being used in parallel by the industry and it can be quite confusing. Get clarification of gamification and game-based training. Explore examples from the industry, learn to explain each of the learning experiences, and discuss the best practices in their development.

Take a Field Trip to **Learn How the Best Do It!** (See page 9.)

Best Practice Speed-Sharing Roundtables

TUESDAY, SEPTEMBER 23 4:30 PM – 5:15 PM

Attend three best practice sessions in this rapid-share format.

BP01 Creating a Virtual Corporate Classroom; *Traci Batson, Project Mgr, Anheuser-Busch InBev; Wilma Davidson, Instructor, University of South Florida;* Learn to use readily available high tech and infuse it with high touch to design a cost-effective, personable, virtual classroom that provides lasting learning.

BP02 MOOCs Are So Yesterday: Welcome to SPOCs; *Diane Gayeski, Dean; Robert Regan, Dir, Ithaca College;* MOOCs were all the rage, with unimpressive outcomes. Learn to take the opposite approach with SPOCs (small private online courses) for developing inexpensive but powerful small-group courses blending the best of new tech and conventional face-to-face intensives.

BP03 Five Steps for Producing Engaging Videos; *Melissa Dailey, New Media Mgr, Harvard Business Publishing;* Get five steps you can use right away to plan and produce your own compelling learning videos, from development of prototypes for market research, to creating production efficiencies, to tips on effective distribution.

BP04 Using Simulations and 3D Avatars to Improve Engagement and Retention; *Tracy Tibedo, Sr Mgr Global Sales Trg, AB SCIEX;* See how simulations and avatars have been used successfully in sales training and how sales management sees this as a valuable, realistic, tool that they can use as part of their overall coaching efforts.

BP05 Jack of All Training: Juggling Multiple Roles and Responsibilities; *Tomeria Allen, Instructional Designer, GEICO;* Most of us can identify with juggling several training roles and responsibilities. Reach the next level of professional success by identifying training development best practices and implementation strategies.

BP06 Subject Matter Experts: Not Your Frenemy; *Lisa Vallad, Continuing Professional Education Program Mgr, University of Colorado;* See how the University of Colorado developed a SME Course Development Guide that has provided a seamless process to allow instructional designers and SMEs to work in harmony.

BP07 Teaching the Field to Fish: Mobile, Gamification and User-Generated Video; *Cory Colton, Sr Mgr, Learning Technologies; Kerry King, Dir, Sales Operations, AutoTrader;* See how AutoTrader sales training has gone mobile using micro eLearning modules, video overviews and conversation scenarios, and performance support resources.

BP08 Lights, Camera, Action! Video Creation on a Dime; *Stephanie Frisbey-Roll, Instructional Designer, CCC Information Services;* Explore the options available and the tips and tricks to making video a success for your learners.

BP09 Got Game? Getting Your Organization Started in Gaming; *Stephanie Daul and Mira Mendlovitz, L&D Consultants, WW Grainger;* Learn how to incorporate gaming techniques into your traditional eLearning designs using existing rapid development tools such as Articulate Studio and Storyline to develop engaging, gamified learning.

BP10 Sink or Swim: What You Should Know for an LMS Implementation; *Heather Porterfield, Sr. eLearning Instructional Designer, National Institute for School Leadership;* Understand what it takes to implement an LMS – from the RFP, to evaluating contenders, to training your learners – and about the questions to ask when selecting and implementing the system, and the deliverables you should expect.

BP11 Blending Live, Online & Performance Support; *Eric Parks, Dir of Educational Design and Technology; Karisa Munoz, Sr Instructional Designer, ASCP;* Learn how the American Society of Clinical Pathology designed, developed and deployed Laboratory Management University, a blended learning solution.

BP12 A Roadmap for Replacing Your LMS; *Eric Desa, eLearning Specialist, Saint Francis Medical Center;* Learn key steps and considerations in replacing an LMS: recognizing the need to upgrade, building a project plan, assembling a transition team, anticipating and addressing implementation issues, and maintaining good relationships with the "old" vendor.

BP13 A Project Management Approach for Preparing Instructors for Online Course Development; *Shubha Kashyap, Assoc Dir, Penn State University;* Learn how Penn State approaches online course development with instructors, ironing out the strategy, communication plans, expectations and timelines for the individual course development projects.

BP14 Developing Highly Effective Blended Learning While Minimizing Development Costs; *Glenn Blazek, Training Specialist, Aerojet Rocketdyne;* Blazek chronicles his proven techniques to tailor multitudes of varying options for highly effective blended solutions while minimizing development costs.

BP15 Deploying Traditional ILT in the Virtual Classroom; *Paul Benton, Talent Development Lead, Raytheon;* Avoid the expensive and time-consuming conversion of ILT to web-based training while preserving the interactive instructor/student experience with video conferencing.

BP16 Caution! You are Training Individuals, Not Drones; *Vivian Londos, Sr Training Analyst, JP Morgan Chase;* Each learning audience is unique, and it is critical to continually analyze your development, design and delivery. Use the science of four quadrant communication styles to support your training process from start to finish!

BP17 Make Training Stick to Achieve Behavior Change; *Arie Wiglama and Jamie Cable, Sr Professional Dev Assocs, Discover Financial Services;* Research tells us that most participants do not implement the soft skill tools, ideas or models learned if there isn't structured follow up. Explore successful learning beyond the classroom strategies and lessons learned from a large-scale organization.

BP18 Onboarding Your Executives Remotely; *Brian McWalters, Sr. Developer; Katrina White, Training Developer, CarMax;* Learn how CarMax developed an onboarding program that partners their new executives with a mentor.

BP19 Transitioning to a Mobile Delivery Platform; *Sean Herd, Sr Trainer; Andrew Bishop, Mgr L&D, Verizon Wireless;* Verizon's implementation of a mobile delivery platform stands out as a powerful example of using technology to enrich the learning and facilitation experience. Learn what they did right – and what they did wrong – when transitioning.

BP20 Unintended Consequences of Technology; *Julie Beyerink, Instructional Design Specialist, Nationwide Insurance;* Our field screams, "Keep up with technology!" Our stakeholders say, "We want more innovation!" The unintended consequences? Not all learners are "digital natives"; not all designers and trainers are up to speed with technology, and the costs of innovation can be high. This discussion will spark ideas for addressing these issues.

BP21 Best Practices for eLearning Design & Knowledge Retention; *Jeff Yandura, Interactive Designer; Bobby Moreira, Development Lead, Chrysler LLC;* To support a very complex and fully integrated manufacturing system, Chrysler's online WCM (World Class Manufacturing) Training must offer a direct, practical, and fast-paced learning environment. Learn about Chrysler's courses and tools and how they use knowledge checks.

BP22 Breaking Boring: Moving Learning Beyond the Status Quo; *Kelly Prince, Sr Design Specialist; Chris Stadler, Mgr of Education and Dev, Gentiva Health Services;* If you work in a conservative or regulated industry, you've likely encountered resistance to changing 'what's always worked.' Learn to: gauge your company's 'creativity climate,' make your case for more innovative learning treatments, and collaborate with SMEs and stakeholders.

BP23 Designing Level 3 and 4 Instruction for Soft-Skills Training; *Justin Sadowski and Mark Heimburger, Sr Instructional Systems Designers, Adayana;* Hear best practices for designing effective Level 3 and 4 instruction from Department of Defense immersive learning projects including: working with SMEs, designing a realistic virtual environment, storyboard dos and don'ts, and evaluating learner performance.

BP24 Getting Designers, Developers and SMEs to Work Together; *Gayle Nadler, Sr Instructional Designer, Time Warner Cable Media;* When designers, developers, and SMEs work together, communication is critical. Learn about tools and processes used to: set expectations for roles and responsibilities; write outlines from source material and SME input; create storyboards; and consolidate feedback.

BP25 Design a Comprehensive Measurement Strategy; *Cathie Maddy, Team Leader Instructional Design, Edward Jones;* Learn how Edward Jones developed a consistent, comprehensive, and coherent measurement strategy to support their blended, competency-based learning programs. See how end-user data is captured through a set of pre-, in-, and post-class surveys.

BP26 Linking Training to Education Credentials to Develop Leaders; *Ken Barber, Mgr of L&D, Shell/Jiffy Lube; Pat Delaney, Associate VP, University of Maryland University College;* Learn how Jiffy Lube leverages its award-winning, two-year training into a Certificate in Management Foundations from the University of Maryland University College and how this certificate is a stepping stone to an undergraduate degree and a retention and performance improvement tool for Jiffy Lube.

BP27 Creative Design Strategies; *Marsha Parker, Sr Instructional Designer, Ford Motor Company;* Learn about constructivist design principles to create a creative and engaging online course and explore collaborative tools that can be used to design a quality online course.

BP28 Making an Impact: Getting to 4th Base; *Crystalle Ramey, Mgr, Design & Development, Kelly Services;* All learning professionals talk about the importance of achieving level 3 and 4 measurement in their learning solutions, but how many actually do it? Learn to identify data sources and answers needed to get to the right metrics – and to articulate barriers and how to overcome them.

Venue, Hotel & Registration

CONFERENCE VENUE

The Online Learning 2014 Conference will take place at:

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Connections Housing is the official hotel agency* for your Online Learning Conference needs – the only guaranteed method of booking your room at our special, reduced rate of $219 single/double per night. This rate is good through August 26 or until the room block fills, whichever comes first. So book your room through Connections Housing today!

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Come early and enjoy Gallery Weekend September 18-21. For its 4th year, GWC galleries invites a select group of national and international contemporary art collectors, curators, and critics to Chicago. **Stay late** and enjoy the 14th year of Oktoberfest Chicago September 26-28. Bring on autumn and pull out the lederhosen! One of Chicago's most popular celebrations of fall and all things Bavarian! For details on Chicago attractions and events visit: **www.choosechicago.com.**

Want to head downtown? Just hop in a taxi or use the #3 bus from the Hyatt Regency McCormick Place for easy access up and down Michigan Avenue to the Loop, Millennium Park and the Magnificent Mile. A handy guide of local restaurants is available online via the 'Venue & Hotel' tab under 'Chicago Attractions.'

Training magazine's

Online Learning Conference 2014

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Certificate Programs ....September 21 – 22
Co-Located Events...............September 22
Conference...........................September 22 (4 pm) – 25

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2. Registration Fees.

2-Day Certificate Programs (Sun, Sept 21 and Mon, Sept 22: 8:30 am - 3:30 pm)

☐ Fee when packaged with the Conference registration $695
☐ Fee for attending a Certificate Program ONLY $895

Select one Certificate Program below.

☐ P01 Fundamentals of Designing & Developing Cost-Effective eLearning
☐ P02 Building Interactive eLearning with Adobe Captivate
☐ P03 Designing and Developing Scenario-Based eLearning in Articulate Storyline
☐ P04 Designing, Facilitating, and Managing the Virtual Classroom
☐ P05 Mobile Productivity: Trends, Tools, and the Way Forward

Co-Located Events (Mon, Sept 22: 8:30 am - 3:30 pm)

☐ E01 Allen Interactions User Conference $395
☐ E02 Top 125 Technology Think Tank........ $395
☐ E03 Higher Ed Symposium........ $395

Online Learning Conference (Mon, Sept 22, 4:00 pm - Thurs, Sept 25)

☐ Conference $1,395

Conference Tours (Thurs, Sept 25) *Space is limited. For Conference attendees only.*

☐ T01 Ace Hardware Tour: Inside the Training Store (8:00 am - 12:00 pm)........ $50
☐ T02 McDonald's Hamburger University Tour (8:00 am - 12:00 pm)........ $50
☐ T03 Naval Station Great Lakes Tour (6:00 am - 11:30 am) $50

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3. FREE to Online Learning Conference attendees.

Hands-On Clinics (Wed, Sept 24: 2:15 - 4:45 pm) **Select ONE:**

☐ C01 Using Social Media for Learning
☐ C02 Designing eLearning for Mobile
☐ C03 Using Brain Science to Improve Learning Design
☐ C04 Intermediate to Advanced Storyline Techniques
☐ C05 eLearning Maker Faire: Create Cool eLearning Take-Aways
☐ C06 Project Scheduling Lab
☐ C07 Story-Based Learning Lab
☐ C08 Selecting Your Development Tool: Let Your Content Drive Decisions

☐ Yes, I plan to attend **Buddy Guy's Legends Club Event** and **Ttvs Awards Program**: Tues, Sept 23 (5:30 - 9:00 pm)

4. Please answer the following. SELECT ONE answer per question.

My job title is:

☐ 1 President or Above
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☐ 3 Director
☐ 4 Manager
☐ 5 Trainer
☐ 6 Supervisor/Coordinator/ Assistant/Specialist
☐ 7 Other (please specify) ________

My department:

☐ 1 General/Corporate/ Administrative Mgt
☐ 2 Training/ Development
☐ 3 HR/Personnel
☐ 4 Finance/ Operations/DP
☐ 5 Sales/Marketing/ Product Development
☐ 7 Customer Service
☐ 8 Education
☐ 9 MIS/Systems Management/Technical
☐ 10 Instructional Designer/ Developer
☐ 11 Other (please specify) ________

My organization's primary business activity:

☐ 1 Manufacturing
☐ 2 Hospitality (food, lodging)
☐ 3 Retail
☐ 4 Wholesale/Distribution
☐ 5 Finance/Banking
☐ 6 Real Estate/Insurance
☐ 7 Business Services
☐ 8 Communications
☐ 9 Transportation/Utilities
☐ 10 Health/Medical Services
☐ 11 Educational Services/ Academic Institution
☐ 12 Government and Military
☐ 13 Consulting
☐ 14 Public Administration
☐ 15 Other (please specify) ________

Total # of employees in all locations:

☐ 1 50,000+
☐ 2 25,000-49,999
☐ 3 10,000-24,999
☐ 4 5,000-9,999
☐ 5 1,000-4,999
☐ 6 500-999
☐ 7 250-499
☐ 8 100-249
☐ 9 Less than 100

Size of annual training/ learning budget (excluding salaries):

☐ 1 $10,000,000 +
☐ 2 $5,000,001 - $10,000,000
☐ 3 $2,000,001 - $5,000,000
☐ 4 $1,000,001 - $2,000,000
☐ 5 $500,001 - $1,000,000
☐ 6 $250,001 - $500,000
☐ 7 $150,001 - $250,000
☐ 8 $100,001 - $150,000
☐ 9 $50,000 - $100,000
☐ 10 Less than $50,000

5. Method of Payment/Credit Card Authorization.

Required for processing.
Please mail check and registration form together.

☐ **Visa** ☐ **MasterCard** ☐ **AmEx** ☐ **Discover**

☐ **Check #** ________ **Payable to Lakewood Media Group**

Card Number

Print Cardholder's Name Exp. Date

Cardholder's Signature Date

By signing this form, you agree to have your credit card charged for the fee selected and to the cancellation policy on page 15.