Learning Lab facilitated by Vantage Partners
Summer 2020 | June 22, 2020

Recap Notes and Takeaways

Thank you to all who participated in our peer-to-peer discussion on "Building Resilient Organizations." Your active engagement and thoughtful commentary made this another successful virtual Learning Lab event. We are especially thankful for those who volunteered to prepare, share, and present—including Tracy Tibedo, our featured guest from Thermo Fisher Scientific.

Let's sustain this critical and timely discussion. Vantage Partners will continue to share insights on the pivotal role Learning and Development leaders play in building resilient organizations. We encourage you to follow up with us, and with others you met through this event.

We look forward to reconvening this growing community of L&D peers. Our next Learning Lab facilitated by Vantage Partners will be held on September 15, 2020, at 11 a.m. EDT. We hope you will join us then.
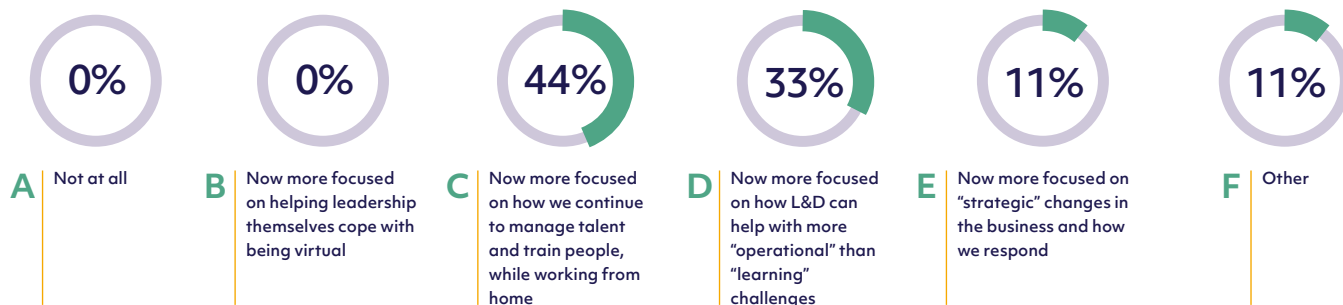
— Danny Ertel, Partner

Welcome and Introductions

Building Resilient Organizations:
The Pivotal Role of
Learning & Development

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10:00 am	**Welcome and Introductions**
10:05 am	**Building capabilities for "the new normal"**
10:15 am	**Tracy Tibedo:** L&D capabilities - leveraged in support of Sales Ops
10:25 am	**Breakout sessions**
10:45 am	**Breakout reports and discussion**
11:00 am	**Panel discussion**
11:30 am	**End of session**

Learning Lab
Summer 2020 Agenda

Since early March, how has the primary focus of your conversations with business leaders changed?
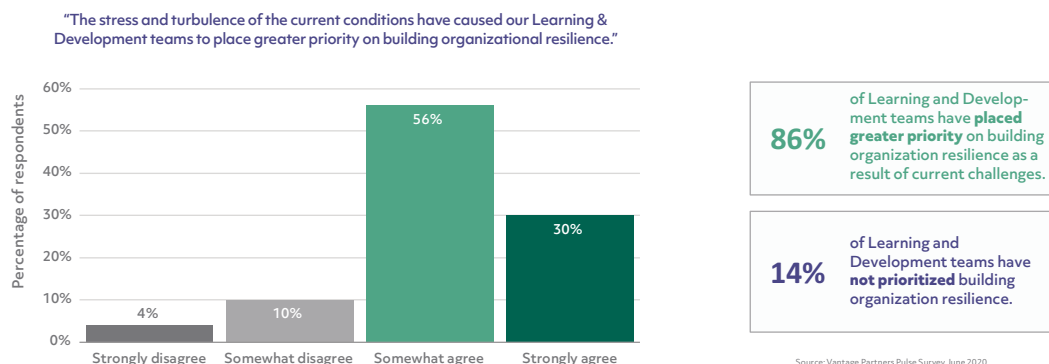
A	B	C	D	E	F
0%	0%	44%	33%	11%	11%
Not at all	Now more focused on helping leadership themselves cope with being virtual	Now more focused on how we continue to manage talent and train people, while working from home	Now more focused on how L&D can help with more "operational" than "learning" challenges	Now more focused on "strategic" changes in the business and how we respond	Other

Building Capabilities for "The New Normal"

Danny Ertel
Vantage Partners

Our conversations have CHANGED. So have our learners' needs — along with everything else.

14% CEOs who have the leadership talent to execute their strategy.
Global Leadership Forecast 2018

54% Employees who will require significant re- and upskilling by 2022.
World Economic Forum's Future of Jobs Report, 2018

80% Talent professionals who say soft skills are increasingly important to company success.
LinkedIn 2019 Global Talent Trends

"…'human' skills such as **CREATIVITY, ORIGINALITY** and **INITIATIVE, CRITICAL THINKING, PERSUASION** and **NEGOTIATION** will likewise retain or increase their value."

"For the first time since the Great Depression, both advanced and emerging market economies will be in recession in 2020" – Gita Gopinath, IMF Chief Economist[1]

"Nearly half of Americans report the coronavirus crisis is harming their mental health, according to a Kaiser Family Foundation poll"[2]

"The world stands on the brink of a food crisis worse than any seen for at least 50 years" – António Guterres, UN Secretary General[3]

In June, widespread protests across the US and many global cities are sparked by the killing of George Floyd and other recent cases of racial injustice. Companies and leaders differ in their response and actions.

What is next?

[1]"IMF set to slash economic forecasts and warns of a crisis 'unlike anything the world has seen'", CNBC, June 16, 2020
[2]"The coronavirus pandemic is pushing America into a mental health crisis', Washington Post, May 4, 2020
[3]"World faces worst food crisis for at least 50 years, UN warns', The Guardian, June 9, 2020

It has never been more important for us — as organizations and as individuals — to build RESILIENCE.

"The stress and turbulence of the current conditions have caused our Learning & Development teams to place greater priority on building organizational resilience."

	Percentage of respondents
Strongly disagree	4%
Somewhat disagree	10%
Somewhat agree	56%
Strongly agree	30%

86% of Learning and Development teams have **placed greater priority** on building organization resilience as a result of current challenges.

14% of Learning and Development teams have **not prioritized** building organization resilience.

Source: Vantage Partners Pulse Survey June 2020

RESILIENCE is partially about anticipation and seeing what comes next. It's also about INFLUENCING.

L&D's evolving role as a strategic partner

- Rapid reskilling/upskilling of key talent
- Cultivating soft skills for changes in business
- Building targeted "capability academies"[1]
- Impacting engagement with remote learning
- Curating learning experiences for groups
- Scaling and personalizing virtual learning
- Partnering to improve learning for D&I
- Reinventing and innovating in "new normal"

Challenges when partnering with the business

- Not given a "seat at the table" to help advise
- Business still engaging with L&D tactically
- Emphasis placed on hard/technical skills
- Skepticism about measuring ROI of learning
- Resistant to adopting new technologies
- Unaware of changes to learning landscape
- Disconnect of verbal and financial support

[1]'The Capability Academy: Where Corporate Training is Going', Josh Bersin, Oct 5, 2019

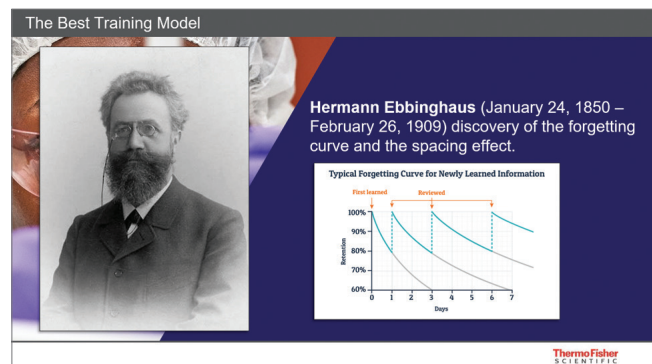*What does your regular engagement with business units look like?*

Getting employees to take this seriously and really start investing in themselves.

It's never been greater. They need L&D now, but are the execs ready for it?

Importance of business investing in L&D.

Colleagues feel overwhelmed and fatigued. They need to take time but can't find time.

Self-directed learning is key.

Many things are changing very quickly.

It's actually helping the business to get out of reaction mode and invest in a longer-term view of learning, not an immediate band aid.

Let's think about how we can embrace these challenges as opportunities to influence how stakeholders and internal clients view L&D. How do we establish, simultaneously, our commitment to service and our own initiative? How do we position ourselves as trusted advisors to the business, so we can be constructive and integral to the business becoming more sustainably impactful?

L&D Capabilities — Leveraged in Support of Sales Operations

Tracy Tibedo
Director of Global Commercial Training, Thermo Fisher Scientific, Chromatography and Mass Spectrometry Division

- Having to pause in-person trainings is challenging L&D leaders to reassess our legacy approaches.
- Before March 2020, many organizations had come to prioritize fast, disjointed learning journeys in the form of short one-on-one sessions, "trial and error" approaches, and on-the-job training.
- But this moment reminds L&D leaders of psychologist Dr. Hermann Ebbinghaus' most critical discoveries of the 19th century:
  - **The Forgetting Curve**, which shows how our memories lose information without conscious efforts to retain the material; and,
  - **The Spacing Effect**, which postulates that learning is more impactful when treated as a process and when our studies are spaced out over time.
- We must remember these phenomenon as we set out to build resilience as a core competency.

The Best Training Model

Hermann Ebbinghaus (January 24, 1850 – February 26, 1909) discovery of the forgetting curve and the spacing effect.

Typical Forgetting Curve for Newly Learned Information
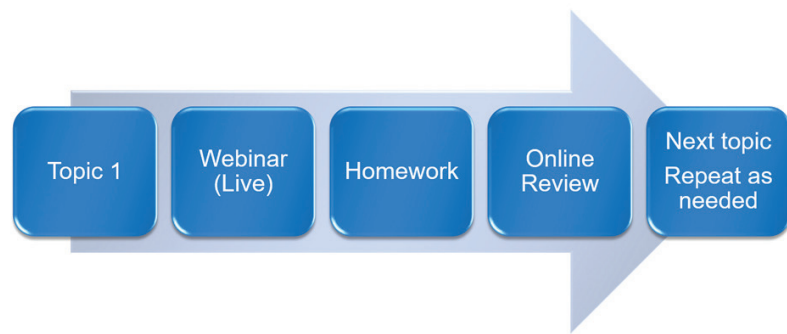
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Not that long-ago learning was:
- Short one on one sessions
- Learned by multiple experiences
  - Trial and error
  - *Eat or be eaten (or stomped on)*
- On the job learning
- Training at the time of need
  - *Throw the spear now!*
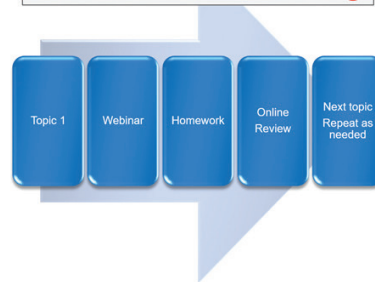 - *Run away*
- Challenging final exam

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The Concept

Topic 1 → Webinar (Live) → Homework → Online Review → Next topic Repeat as needed

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Sales Skills Training

Topic 1 | Webinar | Homework | Online Review | Next topic Repeat as needed
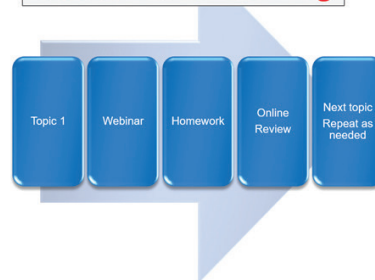
- Before Covid 19
  - Two days in the classroom
  - 10 sessions of self paced on-line work
  - Final assessment
- After Covid 19
  - Eight 90-minute sessions (live)
  - Interspersed with self paced online work
  - Assignments (homework)
  - Multiple assessments and coaching sessions

Customer Training

Topic 1 | Webinar | Homework | Online Review | Next topic Repeat as needed

- Before Covid 19
  - Three to Four days at the customer site
  - 0 sessions of self paced on-line work
  - No final assessment
- After Covid 19
  - 12 online sessions (live)
  - Interspersed with self paced online work
  - Specific assignment for the customer
  - Multiple assessments and coaching sessions

- Thermo Fisher has embedded Ebbinghaus' thinking into all of its COVID era training. There is a concerted effort to offer different modalities to reinforce training, provide practice opportunities, and make coaching assessments more readily available.
- These more frequent, thoughtfully sequenced opportunities have resulted in more and more learners offering to help each other — both during the training on the content in question, and offline on additional challenges as they arise.

Corporate Training

| Topic 1 | Webinar | Homework | Online Review | Next topic Repeat as needed |
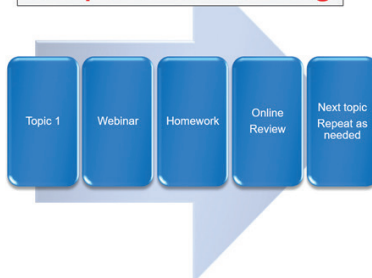
- Before Covid 19
  - Three to Four days in the classroom
  - one or two sessions of self paced on-line work
  - No final assessment
- After Covid 19
  - 8 (ish) online sessions (live)
  - Interspersed with self paced online work
  - Assignments
  - Multiple coaching sessions

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App Chemist Training

| Topic 1 | Webinar | Homework | Online Review | Next topic Repeat as needed |
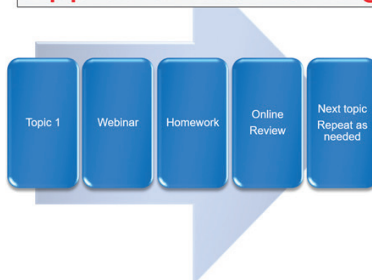
- Before Covid 19
  - Four days in the classroom
  - 0 sessions of self paced on-line work
  - No final assessment
- After Covid 19
  - 12 online sessions (live)
  - Interspersed with self paced online work
  - Use of the software with specific data sets
  - Multiple assessments and coaching sessions

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Outcomes
- Better retention
- Less re-training
- More satisfied learners
- Lower costs
- More accessible materials
- Happy Scientists

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- Though it has always been a challenge to draw a straight line from training to increased sales — particularly amidst COVID-19 — Thermo has seen anecdotally more representatives excelling in the field after embracing these methodologies.
- Leveraging both live virtual sessions and asynchronous micro-learning sequences, learners feel less "stuck in the classroom" and more empowered to leave a digital classroom with tactics to employ in the field.

Building Resilient Organizations: Changes in Your Organization and How to Navigate Them

Breakout Discussions

Group 1 Readout: *What are examples of "L&D expertise" that has been called upon in different ways in the last 3 months?*

- Virtual functionality training: curate role-specific training as follow up to "en masse" rollout (smaller groups of 8-10 vs. 40-50 people)
- How to grow a stakeholder map when we can't meet for coffee
- How to use videoconference for a first-time meeting; what to do when non-verbal cues are missing
- Being called upon versus reaching out to identified gaps to attempt to fill it. So many people have been reaching out over the last 6 months, and it's hard to fulfill all the requests
- Seeing better attendance as a result of switching from in-person to virtual
- On the provider side, there has been shift from process to creative thought; gaining insights from field teams on how to move forward, requiring a shift from being reactive to proactive
- Seeing cross-pollination (creativity) — reaching outside of your organization and asking what people in different industries are doing
- Encouraging people to think beyond crisis management; see the value and innovate for the long term
- Thinking about the future. There is lots of in-person training that we're not going to use when trying to train the country or region. It's so much cheaper to run trainings virtually — and field-based employees are happier with it (better cadence with better results)
- Learning from the best during onboarding

Group 2 Readout: *What are the skills or capabilities that the current environment is causing you to think about (that haven't been a focus in the past)?*

- Heutagogy: Self-directed learning and capturing learning in LXPs [learning experience platforms]
- How to combat tech fatigue: Video calls, meetings, virtual learning
- Empathy in the new working world
- Empathy, clarity of messages, ability to reflect, give feedback in a virtual world
- Getting back to a normal pace — and how to catch up
- Avoiding work in "commuting hours" — how to establish separation between work and home life
- Accelerated change in learning methods and topics
- Re-skilling and Up-skilling
- Soft skills: Leadership — which is not necessarily new!
- Change in sales process — allocating sales teams into new roles: Required a change in learning to provide safety, training customers to order online, ramping up a call center for those who don't want to order online or see their sales person face-to-face. Leads to safety training, change management
- Training on using and navigating virtual tools

Group 3 Readout: *As you fast-forward in your mind to the next crisis or challenge the business will face, what are you starting to do to create resilience?*

- Getting our people to think about the purpose of resilience and why we need it
- Challenging our people to keep their eyes on the prize
- "I'm wearing a bigger HR hat than I ever have"

- Internal stakeholders are asking for more courses than ever on unconscious biases
- Providing curated course catalog to enable our people to build resilience with themselves
- "Weekly content playlists" are extremely helpful and well-received

- Consumers are looking to virtual learning platforms now more than ever. From that emerges two challenges:
  - Showing them how to maintain productivity and sustained learning
  - Preparing businesses to work through their siloes and their matrices to continue sharing learning
- A lot of organizations are looking to analytical and tracking capabilities within their programs. In a virtual environment, organizations want to be able to track learning
- What are capabilities beyond LinkedIn learning?
- Giving folks a voice. Change management is critical. Asking our people, "How are you managing through? How are you balancing working from home and in office?"
  - Thoughtexchange.com — a crowd-sourcing tool enables participants to use smart phones and tablets to share strategies and thoughts, and then vote on the top ideas.
  - FlipGrid — another tool that allows participants to upload videos and other content in response to specific prompts.

Panel Discussion

Tracy Tibedo
Director of Global Commercial Training, Thermo Fisher Scientific, Chromatography and Mass Spectrometry Division

Michael Woodard
Director, Performance Optimization, United Distributors

Facilitated by Danny Ertel
Partner, Vantage Partners

What skills are critical to enhancing resilience in an organization?

MW: Generally, the ability to reflect as a leader and give effective feedback. In no particular order, listening, empathy, enquiry, patience, clarity of message are all critical to developing resiliency.

TT: I would add that ensuring that everyone knows how to use appropriate conference tools to communicate with customers and leaders. It's also critical to make sure that people are thinking beyond what they've always done. Rethink ways of approaching customers and managers.

How do you go about identifying what is "adjacent" to learning changes? How do you make them happen for the learning intervention to be effective?

TT: Something as simple as using video more often is helpful, and we've trained on how to do that. So, internally we can develop videos for those kinds of trainings. Other examples are new software tools we have available for audio editing and developing good PowerPoint content. You can't simply take what would be a live presentation and deliver it online and then expect it to be effective. We've reviewed a lot of slide decks and advised on how to present them… We're also promoting a mindset change that people can use video tools without outside help.

What have you found most helpful in engaging the business and investing ahead of the need to build resilience for the next unexpected event?

TT: This has taught us to be ready to be agile and make changes quickly. My team is better prepared to make changes on a dime. If for some reason a pandemic happens again, we'll be able to react faster.

MW: I have an executive advisory board and we meet quarterly. In those meetings, I get updates on the business.

For example, we're instituting a call center. I'm lucky to have a seat at the table to have conversations around business challenges and skill issues that we need to address.

Do you have any lessons learned to share on engaging leadership among our broader participants? Arguments that are persuasive to leadership?

TT: Data always helps. Benchmarking and rankings can offer evidence on where firms are at parity — or where there are gaps. Look into what peers are thinking. Pay closer attention to LinkedIn Learning and its complementary services. In larger firms, there's usually a breakdown — corporate L&D vs. commercial L&D. It's good to work with those partners, and we need to understand budgets and our needs before we start building out new offerings.

Beyond stereotypes about generations, are there any big generational differences in readiness to cope with uncertainty?

MW: I'm noticing behavioral tendencies across generations, but everyone has the same needs.

TT: We haven't seen any substantive differences within our sales force. One of the people who did something really progressive for his team is actually near retirement. People are embracing these tools!

Taking L&D's Seat at the Table

What should our role be in Business Continuity Planning?
Understand what is on leadership's mind.

"Our company's leadership has begun to recognize the role of Learning & Development in Business Continuity Planning."

Percentage of respondents

- Strongly disagree: 2%
- Somewhat disagree: 15%
- Somewhat agree: 46%
- Strongly agree: 37%

83% of leadership teams have **started to recognize** the role of Learning and Development in Business Continuity Planning

17% of leadership teams are **not recognizing** the role of Learning & Development in Business Continuity Planning

Source: Vantage Partners Pulse Survey June 2020

- We offer training throughout the organization to develop new skills, quickly and globally.
- L&D has a big role in integrating what colleagues need to do their jobs most effectively.
- We are performance accelerators, not just information exchangers. We help align corporate and commercial goals with success metrics.
- We are prepared to assess the impact of the change.
- In times of challenge, L&D can be the 'internal voice' of the organization. They can be a great assistant to leaders working to drive change through those challenging times.
- L&D aligns Human Resources goals with Commercial Operations goals.
- Understand what is on leadership's mind.
- Know where the skills are of your organization.
- Connecting the dots on what's needed to bridge the gap.