Learning Lab facilitated by Vantage Partners
Fall 2020 | October 6, 2020

Recap Notes and Takeaways

Thank you to all who participated in our Fall 2020 Learning Lab and contributed to our discussion of "Leaning into Virtual: What We've Learned Thus Far about Magnifying L&D's Impact across the Organization." To further open up this virtual space for peer-to-peer discussion among learning leaders, we organized the fall event as a "flipped" workshop, in which we primed the discussion by sharing video insights from several learning leaders prior to the event.

Help us continue this crucial discussion—and continue to build this community for learning leaders, which soon will have its own discussion group on LinkedIn. Vantage Partners will continue to share insights on the evolving, and pivotal, role of Learning and Development leaders as we help our organizations and people navigate and adapt through disruption and uncertainty.

Please share what you've learned with others across your organization, and we encourage you to follow up with us and others you met through this event. We hope you will join us at the next Learning Lab facilitated by Vantage Partners.

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— Danny Ertel, Partner

Pre-Workshop Insights from Learning Leaders

"We're More Agile as a Team"
From the Head of Learning & Development, Financial Advisory and Wealth Management Solutions Company

Surprising accomplishments: We've seen two clear achievements that would not have been possible in the office.

1. Scope and volume of our training offerings have expanded, to include increased training offerings and learning resources (podcasts, access to business school videos, etc.). We added new courses to navigate new normal. Examples include working effectively in a remote environment, managing teams remotely and complementing offerings with helping professionals manage the stress, taking care of dependents, and tools and resources around mindfulness.

2. L&D launched a management development program initially intended for a cohort of 15 in person. Because of changing environment and remote needs, we pivoted in agile fashion to make it 100% virtual. As a result, were able to increase cohort size to 24 managers and train more managers than initially intended.

What worked: Our ability to be flexible and agile.

What we'd do differently: Looking back, if we had conducted a learning needs assessment at end of Q1, it may have given additional insights into the learning resources that professionals needed during changing times.

"Asking People to Do Counterintuitive—and Straightforward—Things"
From Learning Leader, Global Life Sciences Company

Lessons learned: It's hard. Using new platforms, the need to grab attention, making the connection between learning and real work, and trying to still measure impact—all have gotten harder, as we've leaned on virtual.

What has worked: The month of September was dedicated to learning (Sept) as part of corporate culture journey about being curious, set personal goal of 100 hours dedicated to learning, had support and permission to take time to do this, just make sure to tie it back to work as best one can

How we're navigating: We're asking people to do some counterintuitive and some straightforward things.

- We've spent more time on messaging work/life balance, emphasizing taking care of yourself physically so that zoom/virtual working isn't overwhelming.

- We've used different platforms to add to Microsoft Teams to make learning more interactive, engaging – leveraging live polling, e-whiteboard, and using chat discussions more effectively

Developing senior leaders: We already had planned to scale (mostly virtually) our senior leaders' in-person learning experience and program. Everything they've learned this year has just accelerated it, and helped to work out the bugs; this was an important gain from this year.

"Lean on the Professionalism"—and L&D's Business Impact
From Vice President, Learning Solutions Company

Lessons learned: Lean on the professionalism and expertise we have in learning, and have confidence to guide the organization. Emphasize business impact, not just learning impact. There is opportunity in crisis for learning; we can move things forward with confidence, with help of the latest technologies.

What's worked:

- Hybrid learning solutions and events allow for conversations in a safe office environment while also online; make sure you give time to prepare and for dealing with tech. Be aware that the people in the room aren't the priority; use mics, and in-person folks may still use phones. Give time at the beginning to greet, for virtual hugs/waves— you need the ability to connect at beginning and end.

- Hang Tens—using hangouts to hear from thought leaders, for checking in, and for sharing expertise on variety of key topics. Be mindful of how you're facilitating differently virtually (how you're showing up, your movement)

Welcome and Introductions

Leaning into Virtual:
What We've Learned Thus
Far about Magnifying L&D's
Impact across the
Organization

Learning Lab facilitated
by Vantage Partners

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Learning Lab
Fall 2020 Agenda

| Time	Session
11:00 am	Welcome and Introductions
11:05 am	Breakout Sessions
11:30 am	Readouts and Discussion
12:00 pm	Panel Discussion
12:25 pm	Closing
12:30 pm	End of session

1. Going virtual is an entirely temporary phenomenom for us. When the health crisis is behind us, we'll be back to as much in-person training and meetings as before.
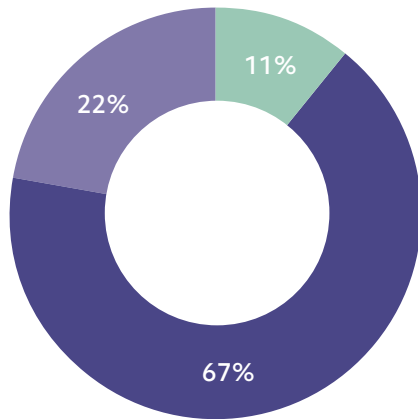
2. During this crisis, L&D has been instrumental in enabling virtual operations, beyond training.

Agree Strongly	Agree	Disagree	Disagree Strongly
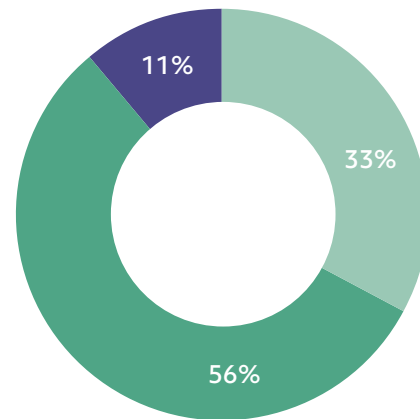
Agree Strongly	Agree	Disagree	Disagree Strongly

"Leaning into Virtual" Breakout Sessions

Group 1 Readout: *How have you and your L&D team leveraged virtual to scale learning for your organization, or to tackle topics or audiences you might not have otherwise reached?*

- For scale, we've focused on roadmaps and foundational delivery around core needs with key talent groups; enabling managers to be managers; and redesign of formerly in-person programs with blended VILT and self-direction.

- Pandemic heightened the need for mental health (wellness)—not our core competency and not something we've developed before. We leveraged content from partners, included tracking signs of happiness, resiliency, wellness … and hugely successful. Through our learning platform we can scale seamlessly.

- Opportunity to connect L&D teams to Benefits team; need to understand what are other parts of the business are doing, and coordinate/offer unified holistic offerings across the firm.

- Impact organizational culture and structure.

- Limited budget and need to optimize resources because of pandemic. Emphasis on collaboration, pilots on governance. How can we find leverage, go to market together, reuse commissioned work?

Discussion Comments

Instead of the L&D team creating, developing, implementing all the trainings, rather, we said let's educate the department leads or managers and have them do the trainings. It's really driving interest and engagement and participation—making the learner part of the solution.

When you're pivoting face-to-face to virtual, it's not as simple to convert the content to a virtual format.

We've had an opportunity to rethink and scale up. You're not constrained by the number of people in the room and other challenges you typically have in [in-person] environments.

A lot of people who are really great at the technical content just don't have the confidence to stand in front of a group of people virtually to share it. Doing Toastmasters, we have seen a small group of people have significant professional growth.

All those cues you rely on in a face-to-face, in terms of body language, communication, all of that goes away. So you almost have to mimic some of that to drive engagement: micro-bites — smaller chunks of learning; more peer to peer activities; more gamification.

We've been able to break down barriers and siloes that typically occur in functions, where people really only have relationships with professionals in their team or this side of the business.

Group 2 Readout: *How have you overcome the different challenges associated with delivering learning virtually this year?*

Some challenges, and strategies for overcoming them:

Challenge	Strategy for Overcoming
Getting people to show up to virtual trainings	■ Leadership buy-in and support ■ Use media, videos, and commercials from leaders to promote virtual events
Maintaining engagement during virtual trainings	■ Create a learner-centric environment—the training is about them, from them and for them ■ Encourage people to turn on their videos ■ Use platform functions, such as polling, chat, forums ■ Gamification ■ Focus on setting expectations up front ■ Application of content is key for driving interest and engagement (what's in it for me?) ■ Don't tell people that the training will be recorded; it makes them think they can watch it later ■ Mix training with activities (every five to 15 minutes)

Preparation, planning, and coordination becomes more important for virtual events	■ Hire a new FTE to manage virtual learning

Other challenges identified:

- Understanding participants' preference for condensed vs. spaced learning
- Managing virtual time (onboarding to the platform vs. content/discussion
- Everything seems to take longer
- Managing personal time when it seems like business hours last longer
- Helping people get comfortable using the platform training is on
- Replacing face-to-face events with virtual format
- Collaborating with L&D peers in the virtual environment
- Choosing the right platform for virtual trainings
- Getting buy-in from internal stakeholders to hold virtual trainings/events

Discussion Comments

You do get a different engagement when you get people in the business to deliver information. I did a ten-second video, and I was shocked about the engagement that got, something so simple and quick.

The learner-centric environment is really important. It's really about keeping the people in the room—the reason that you're doing this—at the center of it all.

There are benefits if you don't record meetings. It's nice to have that freedom of thought you'd have if you were in a room. You don't usually put on a recording in the room; in fact, with GDPR you're safer not recording this stuff. People will show up if they feel like they might be missing out as well.

People are getting budgets they weren't before. This is a disruptive time. What used to take two months is now taking two weeks.

Panel Discussion

Sonia Malik
Learning Strategist, IBM Training & Skills, IBM

Niamh Sproul
Head of Learning and Development, Geller & Company

Moderator: Danny Ertel
Partner, Vantage Partners

Surprises about going virtual in the last six months

- There are good surprises and not so good surprises.

- We have always been very old school, one full day, two full day training deliverables, but when we condensed our offerings to 60 minutes or 90 minutes, we actually got higher engagement. The smaller burst of time didn't feel like it was as taxing on learners' time.

- People used trainings as an opportunity to connect—so L&D provided not only learning connection, but that people connection.

- A focus around how much we needed to take care of each other. And the mental health and wellness aspect … learnings which were aligned to mental health, resilience, wellness.

- 33% of our workforce already was mobile and virtual, but saw how other people struggled with it, and how much we took it for granted. So we try to help partners who've never done virtual before.

- It's okay to have a water cooler conversation. It's okay to talk about your challenges that you can't go to the hairdresser and color your hair. Changing the way we're engaging with each other, we have been able to actually improve our working relationships since the pandemic.

- People are open to networking and learning from others; during the pandemic, everybody has the time, you just have to ask

- Quick, five-minute videos coming out from the leaders really emphasize empathy, making you feel comfortable.

- Mental health was a big taboo; now it seems to be a mainstream conversation and it's not a taboo anymore.

- Multigenerational piece: differences among Millennials, Gen X, Gen Y, Boomers
  - Millennials tend to have their online personae, but in person—especially if they're technical—they don't have the interpersonal skills and can't speak up in a room or a meeting. They've really jumped into all of this virtual and they've been loving it.

- New CEO is a straight shooter, but also empathetic, very compassionate. He started off instantly with CEO chats, started putting out encouraging sound bites. That set the stage for a lot of other leaders in the organization.

Leaning into Virtual: How is L&D Showing Up, Impacting the Business?

- People need to feel motivated in order to innovate, so we helped the business put in an informal recognition center, providing an opportunity to celebrate someone's work or the great job by your team.

- We helped operationally from a morale perspective, by instituting social hours.

- L&D pivoted really quickly early on—we were one of the groups that pioneered the usage of our online platforms to instigate meetings, get your cameras on, engage with people. We were definitely part of the organization that accelerated engagement in our technical platforms.

- We tried to break the mold with how the organization communicates; partnered with communications team around a Get Curious newsletter (now quarterly)

- L&D focused on and supported D&I and philanthropic efforts.

- The pandemic gave us an opportunity to unify the organization around similar procedures and process— how to create better meeting structures, how to write emails, how to develop content and specific types of presentations. And if they need help with job aids, or documentation, We can help with that too.

Discussion Comments

That was a real surprise for us — that people were vulnerable, and people were showing up vulnerable, and that vulnerability led to them being more open and to having more of an open mindset.

A lot of leaders are showing their vulnerability, and are really engaging in those conversations, encouraging their management to be vulnerable and show up.

We really pioneered and pushed, with our D&I leader, content on D&I. That's now been a huge focus within the firm.

Showing our vulnerability is part of being able to do it for the longer haul. We can all sort of grit our teeth and get through something short. But when it's ongoing, we have to expose a different aspect of ourselves and engage with others in a different way.

We lost one of our colleagues early on to COVID. And it really brought everyone together. This sort of feeling and desire and need to take care of our people came out from everyone. It really was a game changer.

Millennials tend to have their online personae, but in person — especially if they're technical — they don't have the interpersonal skill and can't speak up in a room or a meeting. They've really jumped into all of this virtual, they've been loving it.

In L&D, we're great with being able to do ice breakers and things like that. So we helped some of our colleagues do social hours — have a glass of wine together on a Friday evening, or just meet for a virtual cup of coffee.

Closing

The good news is …

	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree

The stress and turbulence of the current conditions have caused our Learning & Development teams to place greater priority on building organizational resilience: 2% | 13% | 49% | 36%

The current health, economic, and social challenges have shown our company culture to be resilient and capable of anticipating, adapting, and responding to such challenges: 2% | 6% | 57% | 35%

Percentage of respondents

Source: Vantage Partners 2020 Soft Skills Survey; N = 140