



Balancing Learning Opportunities with Business Objectives

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Q: In the evolving landscape of leadership, a crucial challenge for up-and-coming leaders is the delicate act of aligning the diverse needs of various stakeholders with the overarching objectives of their organization. Given your extensive experience in managing a significant number of learners, what insights can you offer for those navigating this complex terrain? Specifically, how should they approach the task of balancing these competing demands while advancing the goals of the organization?

A: My perspective on this is multifaceted.

Intake and Governance

It starts with the necessity of governance. Effective leadership entails a systematic process for handling requests. This begins with acknowledging each request, ensuring the client is aware that their needs are being documented. This isn't a commitment but a necessary step in the documentation process. At my company, we employ a numeric system for prioritizing these requests, aligning them with our strategic initiatives. This helps us focus on priority areas, especially from a learning perspective.

Providing Support for Everyone

However, addressing all learning needs isn't feasible. Our strategy involves empowering the business units by providing them with tools, templates, and a variety of learning solutions that they can adapt to their specific needs. These solutions are cost-effective and agile, allowing for quick responses to immediate learning needs.

Formal Learning for Key Initiatives

For broader needs, like upskilling middle managers, we adopt a more programmatic approach. This involves a combination of hybrid, offline, and face-to-face learning experiences, all aimed at specific outcomes. Our goal is to ensure learners not only acquire knowledge but also develop the necessary skills.

Fast Resources

We also emphasize quick access to content. Playlists have become a vital tool in this regard. These are curated courses designed to cater to various stages of an employee's journey, such as new hires, promotions, and major organizational changes. These playlists are rolled out to our clients, addressing common challenges that impact many employees.

Modular and Multi-purpose

Moreover, we democratize learning by decoupling modules from broader programs, offering them as standalone options. This approach prevents the creation of training disparities among different employee groups. We believe that training should be seen as essential by everyone, fostering a culture of continuous learning.

Sequenced Learning

Our use of 'playlists' refers to a curated selection of online courses, both from external vendors and our in-house materials. These are designed to guide learners from introductory to at least intermediate levels. Participation in these courses is part of our company's mandatory professional development goal, providing a structured framework for employees to advance their skills.

Deepening Skill in Role

Lastly, we focus on job enrichment and skill mastery, which allows for horizontal career movements within the organization. This approach not only enhances internal mobility but also prepares our workforce for changes in technology and job roles. By identifying and training on skills adjacent to current roles, we enable

seamless transitions for employees to new positions, as seen in our recent initiatives with underwriting assistants transitioning to underwriter roles. This strategy not only strengthens our workforce but also makes it more resilient and adaptable to change.

Q: In the context of effectively scaling your training and development processes, have you found any technological solutions that facilitate this task? Often, managing such initiatives can be labor-intensive, with many organizations resorting to a mix of platforms like SuccessFactors and various spreadsheets. Have you encountered any particularly effective tools or technologies that have helped streamline this process?

A: Yes, we have indeed turned to technology to assist us in scaling our training and development initiatives. While I'm a strong advocate for the use of AI, our approach extends beyond just technological solutions. We actively collaborate with thought leaders in the HR field and heavily rely on cutting-edge research. Staying abreast of best practices is a priority for us, and we often participate in relevant training to harness these insights effectively.

This approach allows us to identify and adopt use cases that closely mirror our own challenges and needs. By studying successful examples from

other organizations in similar positions, we are able to adapt and apply these strategies within our context. Additionally, we work closely with consulting firms to implement these practices effectively. This collaboration has proven to be highly beneficial in enhancing our training and development processes, making them more efficient and impactful.

Q: You mentioned that every employee in your company is expected to meet a professional development goal. Could you elaborate on how you ensure accountability at the leadership level to guarantee that this objective is consistently achieved?

A: To foster accountability for professional development within our organization, we've implemented a point-based system integrated within our performance management framework. Each employee's goals collectively must sum up to 100%, with professional development (PD) goals constituting 5% of this total. This system is closely monitored through our performance management and self-assessment processes.

During these assessments, employees are required to detail their achievements in their PD goals. They must specify what they aimed to accomplish and what they actually achieved. Additionally, we incorporate a follow-up question about the resources utilized for these PD goals.

This is facilitated through a dropdown menu in our system, where employees can select from various internal resources such as LinkedIn Learning, Udemy for Business, or other vendors.

By embedding this process in our performance management system, we ensure that these goals are not only set but also documented and tracked. The Professional Development (PD) goals are specifically outlined at the start of the year, and progress is evaluated semi-annually — at the mid-year and end-of-year marks. This methodical approach allows us to maintain a clear record of each individual's professional development journey and ensures that these goals are given due importance alongside other organizational objectives.

Q: The use of AI in the workplace, is a topic of growing importance. As a professional, what are your thoughts on the primary concerns companies generally have regarding the integration of AI in the workplace, especially in the context of HR and employee management?

A: The integration of AI in the workplace, particularly in HR, comes with a spectrum of concerns, varying across different stages of the employee lifecycle. For instance, in the initial phases like screening applications, there's a significant worry about implicit bias that AI might introduce. Privacy is another major concern for

employees, specifically regarding how their data is handled and the safeguards in place to protect it.

In areas like learning and development, there are apprehensions about issues like copyright and the handling of proprietary material. Additionally, our technology teams are often concerned about potential hidden bugs in AI systems that could inadvertently leak sensitive information, raising serious security concerns.

As HR professionals, we need to understand and address these concerns thoughtfully. It's important for HR to identify specific, beneficial use cases for AI, starting with tasks that have a significant impact yet are less sensitive, like standardizing job descriptions or identifying skill gaps – areas that are currently labor-intensive. This approach allows companies to build trust in AI's consistency and reliability before expanding its use into more complex areas.

Eventually, I see great potential for AI in course development, aiding learning and development teams to become more agile in creating content. However, it's crucial to remain vigilant about the biases inherent in AI, as it reflects both our flaws and strengths. We need to be proactive in monitoring and correcting these biases.

Embracing AI in HR isn't just about leveraging new technology; it's about overcoming apprehension and recognizing that we're already interacting with AI in various forms, like chatbots. The goal is

to gain better control over AI, ensuring it works for us rather than against us, and to approach it with a mindset of cautious optimism rather than fear.