expert insights

Strengthening Learning Teams for Strategic Level Impact

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Q: Work arrangements have been evolving post-pandemic. What is your perspective on how companies, especially large ones like yours, are adapting. Given the impossibility of having everyone in-office and the increasing preference for remote or hybrid models, what changes or trends have you observed in workplace arrangements? How has this shift impacted the overall functioning and employee dynamics in your organization?

A: During the pandemic, our company adapted exceptionally well, which fundamentally changed our approach to work arrangements. It's as though the "genie was let out of the bottle" in terms of employee expectations. From a senior leadership viewpoint, there's a strong inclination to return to the office, especially since ours is a relationship-driven business that benefits from face-to-face interactions.

However, even before the pandemic, certain functions like human resources were already operating remotely. To address this evolving work landscape, we formed a task force that diligently studied and developed policies during and post-pandemic. This proactive approach was well-received and symbolized good faith in balancing employee needs with business requirements.

Realizing that a fully remote model, despite its high productivity, contradicts the nature of our business, we've settled on a hybrid work schedule. This typically involves three to four days in the office, usually three, with the flexibility to choose these days based on individual or team preferences. This hybrid model seems to strike a balance between maintaining essential in-person interactions and offering flexibility to our employees, aligning with both our business objectives and the evolving work culture.

Q: In the context of distributed teams, where members are working remotely or from various office locations, have you observed any specific traditions or practices that enhance team cohesion and bonding? For those looking to foster a strong team dynamic in a distributed environment, what practices would you recommend?

A: Our team, which is truly global, spanning across Asia, the US, and the UK, has developed a robust meeting culture that surprisingly aids in team bonding and efficiency. While it might seem counterintuitive to have numerous meetings, we ensure that they are purposeful and meaningful. We organize them strategically to involve different subsets of the team.

For instance, our leadership team meets with department heads twice a week, and our content review team meets with the portfolio team weekly. Additionally, we hold monthly all-team meetings to keep everyone informed and aligned. This structure of regular, small-group meetings across various team segments maintains a sense of energy and involvement.

These meetings are not just about discussing work; they also provide opportunities for team members to understand how tasks are managed globally and to align our approaches uniformly. By sharing information, insights, and intelligence, we manage to stay connected, informed, and engaged as one cohesive unit.

Leadership plays a crucial role in this setup. A leader comfortable with a distributed, remote workforce can seamlessly integrate team members, minimizing any sense of disconnection. We also have overlapping working hours, which are integral to our operations. This allows for around-the-clock coverage, ensuring that there are designated times when the entire team can come together, regardless of their individual schedules. This method has proven to be quite enjoyable and effective, fostering a well-organized, predictable, and efficiently functioning team environment.

Q: In today's hybrid work environment, how do you replicate the personal connections and team bonding that traditionally occurred in physical office settings? Specifically, how do you facilitate the kind of interactions where team members share personal interests, like cooking hobbies or pet ownership, which help in building deeper relationships?

A: To foster personal connections in our virtual work environment, we incorporate icebreakers at the start of our meetings. These icebreakers are crucial for revealing personal interests and hobbies, contributing to a deeper understanding among team members. This kind of interaction also frequently occurs during one-on-ones, which our leadership team prioritizes to get to know each individual better.

Interestingly, personal details often emerge spontaneously as we gather for meetings. For instance, a leader might reference a team member's recent trip or hobby, integrating these personal elements into our professional interactions. This approach helps to create a more personalized and relatable atmosphere in all our meetings, ensuring that team members feel valued and recognized as individuals, not just as cogs in the machine.

Furthermore, we maintain a sense of levity and celebration in our team culture. We organize team-building activities that are not just fun but also meaningful, like assembling kits for charitable donations. These activities are inspired by and often coordinated with our employee resource groups, ensuring that they resonate with our team's values and interests.

This integration of team-building into our daily culture, rather than as occasional standalone events, has been highly effective. It keeps the team engaged without detracting from work and has become a productive and integral part of our organizational culture. This approach has been well-received and is a testament to our commitment to building a strong, connected team.

Q: I'm curious about your experiences in establishing Centers of Excellence, particularly in the realm of compliance training. What were the most significant challenges you faced in creating a Center of Excellence in this field?

A: In my tenure, particularly on the financial side of the organization, establishing a Center of Excellence in compliance training was quite a challenge. The predominant mindset at the time was that training was a generic task that didn't require specialized skills. This perception created a significant hurdle in recognizing the need for professional training experts.

To address this, my initial step was to conduct a comprehensive gap analysis of the existing training processes. This revealed some glaring deficiencies, which I backed up with objective industry metrics. I proposed a transformative approach to compliance training, emphasizing the creation of content that was purpose-built and significantly more engaging than off-the-shelf solutions. My strategy included reducing the length of training sessions by 75%, aiming to make them less burdensome for employees.

To implement this, I assembled a diverse team comprising individuals from various business sectors, including facilitators, instructional designers, logistics experts, technical writers, and content developers, all with a background in education. We collaboratively redesigned the eLearning experience, standardizing it with a peer review process that involved both internal and external reviewers.

Our training modules were designed to be concise, averaging 30 minutes, focusing on top risks, and heavily based on realistic scenarios. These were coupled with diagnostic exercises and assessments, requiring a minimum score for certification. This approach revolutionized our compliance training, making it more relevant, practical, and engaging. The training felt gamified but not gimmicky, adding value and applicability to the job.

This initiative not only transformed the perception of compliance training within the organization but also garnered recognition from regulators, marking a significant achievement in our efforts to streamline and enhance compliance learning. We demonstrated that compliance training need not be dull or punitive; it can be an engaging and valuable learning experience.

Q: In your experience, how valuable has Lean Six Sigma training been in the context of learning and HR? Specifically, how has it influenced your approach to developing learning materials and managing HR processes?

A: Lean Six Sigma training has been tremendously valuable in enhancing our efficiency, particularly in terms of time-to-market for learning materials. This methodology enabled us to offer rapid development cycles, such as three weeks for quick development projects and six weeks for standard ones. We also have an extended eight to 12-week cycle, but we've found that most of our clients prefer the six-week option, striking a balance between speed and thoroughness.

This efficiency translates into a variety of deliverables, including videos, webinars, podcasts, and eLearning modules, allowing us to cater to diverse learning needs. The ability to streamline our processes has been a game-changer, moving away from the traditional, lengthier frameworks like the ADDIE model, which often suggested a three-month development period. We've adopted a more flexible approach, likening our services to different car models – the Ford, Mini Cooper, or BMW – each representing a different level of investment in terms of time and resources.

Moreover, Lean Six Sigma helps us critically evaluate and streamline processes that are overly linear or have too many handoffs, questioning the necessity of each step. Although I consciously avoid using the term 'Lean Six Sigma' due to some skepticism around its applicability in our field, I still employ its principles and 'tricks' effectively. The methodology's emphasis on efficiency and process optimization remains highly relevant and useful in our work in learning and HR.

Q: In your dissertation, you examined the impact of board certification on teachers' performance abilities. Could you share insights from your research and discuss how this might inform hiring decisions for a learning team, particularly regarding the importance of specific educational qualifications or certifications?

A: My dissertation focused on replicating a study conducted by the National Board of Professional Teaching Standards in North Carolina. The original study aimed to justify the need for a rigorous national teaching certification process. My research sought to determine whether the significant investment of time and money into this certification was truly beneficial. Previous standards emphasized a master's degree plus five years of experience for optimal classroom gains. My study, however, revealed substantial evidence that board certification makes a significant difference.

The key finding was that it's not just about having a master's degree and years of experience. The board certification process cultivates a deeper, more comprehensive approach to teaching and learning. It goes beyond mere classroom time and academic qualifications. It's about developing a well-rounded perspective on instruction, delivery, and curriculum design, which then consistently informs one's teaching practice.

Despite the clear benefits, widespread adoption of this certification has been limited, partly due to the financial and time constraints it places on teachers. Especially during the era of the No Child Left Behind Act, with its focus on high-stakes testing, teachers had limited opportunities for such extensive professional development.

Translating these insights to hiring for a learning team, I believe the right credentials are crucial, though they have evolved over time. Today, I would look for candidates with a strong foundation in project management, a solid grasp of instructional design (beyond just knowing how to use authoring tools), and a deep understanding of curriculum development. It's essential to differentiate between instructional design and curriculum development, as they lead to distinct outcomes in learning materials.

Furthermore, I would emphasize the importance of data analysis skills. The ability to interpret data and tell a compelling story with it is critical for securing funding, headcount, and support from leadership. While credentials can provide a fast track to acquiring these skills, demonstrated experience and proven abilities in these areas are equally important.

Q: When evaluating a candidate's instructional design skills, do you primarily focus on their portfolio and the way they respond to interview questions? What are the key factors you consider in this assessment process?

A:Yes, assessing a candidate's instructional design skills is a comprehensive process that goes beyond just reviewing their portfolio. I place significant emphasis on understanding the depth and breadth of their work. It's crucial for me to see the actual projects they've created and hear about the thought process behind them. I ask them to elaborate on their design decisions, explore the alternatives they considered and why they might have discounted them, and if given a chance, what they would do differently. This helps me gauge their decision-making process and creativity.

Understanding their journey in instructional design is also important. I inquire about their initial training, what motivated them to pursue this career path, and most importantly, how they have evolved in their role. It's essential to know if they are continually learning and adapting their skills.

Diversity in their work is another critical aspect. I look for a variety of projects in their portfolio, as I am wary of designers who stick to a formulaic approach. This can sometimes indicate a lack of understanding of human dynamics in learning environments. If I see a pattern of 'instructional design by numbers,' where they rigidly follow a set formula, it raises concerns about their ability to adapt to different learning contexts and needs.

It's not just about what they've created, but how they've approached the creation process, their adaptability, and their understanding of diverse learning contexts. This holistic evaluation helps in determining their capability to handle the dynamic nature of instructional design in a workplace where requirements and contexts are constantly evolving.

Q: As an expert in the field of learning and development, is there any additional advice or insights you would like to share with professionals, particularly those facing various challenges in their roles?

A: Certainly. A significant part of my role, nearly 50% of it, involves advocating for learning as a specialized discipline. There's a common misconception that anyone can design learning materials and that it's a simple task involving basic tools like PowerPoint. This 'order-taking' mentality drastically underestimates the complexity and importance of learning design. My primary message is to resist this mindset vigorously.

To do this effectively, it's crucial to have a cohesive narrative about what learning truly entails, both from a technical and an artistic standpoint. It's important to communicate that learning interventions are strategic tools that not only enhance performance but also contribute to the organization's profitability. Our role involves transforming knowledge into comprehensible input that boosts productivity and output.

Another key point is that learning professionals aren't expected to be experts in every discipline within the organization. Our expertise lies in extracting essential information and translating it into effective learning experiences. This requires us to lean into the challenge, even when it's not easy, and to recognize the importance of winning hearts and minds in the process.

Additionally, we need to be discerning in our responses to requests for training. It's vital to question the 'why' behind these requests and to understand that there are multiple solutions to educational needs, with training being just one of them. By offering a range of options, we can better serve both the organization and its employees.

Finally, it's crucial to know when to say 'no.' For instance, managers often default to requesting training programs without fully understanding the need or the most effective solution. A deep understanding of the issue might reveal that what's actually needed is something simpler, like a job aid, rather than an extensive training program. This discernment is a critical skill for professionals in our field.

Q: If you could go back in time and give career advice to your younger self. What would you say?

A: Reflecting on my career journey, starting out as a teacher, a path chosen more by my parents than by me, I realize now that it was indeed the right choice for me. At the time, I was uncertain about how to leverage my liberal arts education, which I deeply enjoyed. I think the advice I would give my younger self is to trust in what my parents saw in me. I've always had an affinity for teaching and learning, finding it both enjoyable and easy. It turns out, teaching suited me well, even though I initially doubted it.

However, one aspect I wish I had understood better was the job search process, particularly salary negotiation. If I could advise my younger self, I would emphasize the importance of confidently negotiating salary right from the start. I learned this the hard way, as I struggled with salary concerns until I managed to rectify them, though it was an uncomfortable process.

Looking back, I don't regret the path my career has taken. It led me to Wall Street, which has been the focus of my entire career. I vividly remember my first interview for a learning job on Wall Street. When asked why they should hire me, I confidently responded that I do what MBAs don't. That bold statement not only landed me the job but also forged a two-decade-long working relationship with my then-boss. He later recalled that statement, acknowledging its truth and its role in my successful career. My journey highlights the importance of self-belief and the courage to stand out, especially in pivotal moments like job interviews.