



BEST PRACTICES & OUTSTANDING INITIATIVES

Training editors recognize innovative and successful learning and development programs and practices.

BEST PRACTICES

★ **Automatic Data Processing, Inc.:** **Leaders In Action**

Thirty high-potential global leaders participated in ADP's new "Leaders In Action (LIA)," a rigorous five-month program designed to accelerate their readiness for greater responsibility. LIA includes three week-long sessions and extensive virtual teamwork throughout.

Objectives are achieved through three program components:

1. Business Simulations: Participants, in teams of six, partake in a computer-based business simulation that replicates ADP's business model. Acting as an organization's Executive Board, each team must run a fiscally sound and profitable business through five rounds by building growth opportunities within a highly competitive global market.

2011 SPECIAL TRAINING TOP 125 AWARDS

Top Training Programs/Scope Score
NCO Financial Systems, Inc.

Top Evaluation/Business Metrics Score
SCC Soft Computer
The PNC Financial Services Group, Inc.
Microsoft
Edward Jones

Top Human Resources Score
Vanguard

Top Qualitative Score
Farmers Insurance Group

2. Action Learning: In teams of 10, participants address real business opportunities or challenges defined by ADP's Executive Committee. Teams present recommendations to their executive sponsor(s) and other senior leaders.

3. 360-Degree Assessments and Coaching: Participants receive 360-degree feedback using the Leadership Versatility Index (LVI) from Kaplan Devries to illustrate the connection between leader versatility and business effectiveness. Participants are matched with a coach to interpret the LVI results and design personal action plans.

The program is organized around several key themes, which align with learning activities in thinking strategically, creating economic value, facilitating organizational change and leadership, doing business globally, and sustaining growth. Participants also gain exposure to Executive Committee members, who discuss their leadership journeys.

Since the conclusion of the program in June, four participants have been promoted. On a feedback survey, 100 percent of participants reported an improvement in leadership capability.

★ Farmers Insurance Group: Reserve Business Builder & Career Development System

Independent contractor agents drive results, but new Farmers Insurance agents were not demonstrating within their first three years the foundational knowledge and skills necessary for career-sustainable results. In response, Farmers provided two comprehensive programs:

0-12 Months: Farmers Reserve Business Builder (RBB)

- Roadmap to Career document and resource binder providing three development milestones
- Curriculum consisting of 44 online courses to build knowledge essential for success
- 20 district manager instructor-led sessions to build skills and coach new agents

Results:

- More than 3,200 annual participants
- Conversion to full-time status: 82.4 percent in 2010, up from 77 percent in 2009
- Sales agent learning went from seven months to four months
- ILT hours went from approximately 4,000 to 2,000 per training group, saving more than 1 million hours per year

13 Months-Year 3: Farmers Career Development System (CDS)

- Roadmap to Success and resource binder providing development milestones
- 70 customized online training courses
- Key learning elements in first six months that increase likelihood of career success
- Remaining training taken anytime during 13 to 36 months
- Allows "assess out" option in 13 to 36 months of training
- Structured coaching facilitation support

Results:

- More than 2,200 annual participants
- Career success rate: 68.9 percent in 2010, up from 65.2 percent in 2009
- 21.5 monthly sales averaged in 2010 for career agents

★ FedEx Express: Destination Success For All (SFA)/SFA Workshop

Destination SFA/SFA Workshops are back-to-back instructor-led courses for managers who receive a low score on "Leadership" in Fedex Express' Survey-Feedback-Action, an annual climate or employee satisfaction survey. The custom-designed course is a change initiative to improve managers' leadership effectiveness.

Based on behavioral pinpoint analyses, a training program and change campaign are designed to help the targeted managers increase their leadership capabilities. Extensive analysis identified the "critical few" behaviors that will drive the biggest improvements for managers. The No. 1 item mentioned by highly leveraged managers was creating a positive organizational climate. One hundred percent of senior managers reported that relationship building was needed. Survey results also strongly indicated that managers already had received enough training on communication skills such as conducting employee meetings.

The behavioral pinpointing process identifies the critical few skills that will drive the biggest people improvements for managers. (Depending on the circumstances, two to seven special analyses are done.) The design is customized for each individual, and executive sponsorship is required. Participants experience the power of the new skills via personal exercises, humor, and movie clips. Senior managers from the organization co-facilitate each session with HR instructors.

Four months after the training, the participants and their senior managers in one operating division reported:

- 94 percent saw increased productivity and performance
- 89 percent reported more positive communication, organizational climate, cooperation among employees, and employee/manager relationships
- 67 percent said employees had commented on the changes in their behavior

Overall, some 80 percent of the participants improved on their next Survey-Feedback-Action (SFA) the year after they attended Destination SFA/SFA Workshop.

★ InterContinental Hotels Group: Leaders Lounge

InterContinental Hotels Group wanted to create an engaging but economical way to connect and develop its global corporate and hotel-level leadership community, who had indicated in climate surveys they did not feel connected to each other and senior management. The company also wanted to develop the capability to effectively align its leader body behind major enterprise-wide initiatives and strategies.

To address this, IHG developed the Leaders Lounge, a virtual leadership development community for its 1,400-plus corporate directors and above, as well as general managers at

company-owned hotels worldwide. The Lounge is populated with leadership-oriented material available in quick-read format—downloadable tools, tips, articles, and videos, including clips from the company’s senior executives. The leaders actively share information and can problem-solve online.

The Lounge has been so successful in creating a community of leaders that this year a new, formal learning component was added: The Leadership Academy. Lounge members now can supplement their “five-minute shots of learning inspiration” with deeper dives into 15- to 20-minute e-learning sessions, designed to encourage cascading the learning to their teams. Creation of the Academy also allowed IHG to move two modules of its Senior Leadership Program (previously held on-site) into virtual mode, generating tremendous cost savings.

The Lounge costs \$1 per day per member—5 percent of the cost for a typical three-day residential leadership workshop. More than 70 percent of Lounge members use the Lounge in any given month, an average of six times each. Lounge members have downloaded and shared more than 3,000 leadership tools with their teams around the world. Lounge members in various locations worldwide have taken popular content from the Lounge and used it to build real-world local learning workshops and training sessions. Engagement scores on the annual climate survey for hotel general managers, who comprise 75 percent of the Lounge membership, were up 3.2 percent for 2010 over the previous year.

★ **Oakwood Temporary Housing: Hardwiring Sales Training for Business Results**

In late 2008, Oakwood embarked on a Sales transformation to grow sustainable, profitable revenue. The objectives of this Sales transformation included: moving from an order-taker Sales organization to an order-maker one; aligning talent and top-grading; implementing a new Sales compensation plan; aligning training programs; and formalizing coaching and mentoring. Learning & Development’s work to “hardwire” this transformation has continued into 2010.

Working with Sales leadership, L&D wrote “The Sales Playbook,” incorporating a combination of best practices from top performers and suggestions from Miller Heiman’s Strategic Selling program. During 2009 and into 2010, L&D delivered this training to all sales associates via a five-week Sales Onboarding Training Camp. Participants learned how to build strategies for a Single Sales Objective (SSO) using the Strategic Selling program and an account-planning tool called a “Blue Sheet,” which helps associates create multiple customer scenarios.

In 2010, L&D partnered with Sales leadership on:

- Oakwood Associate Review (OAR)
- Measuring Single Sales Objectives (SSO)
- Ideal Client Profile training (ICP)
- Quarterly sales calls

New performance management tools round out the transformation and are contributing to its sustainability. Weekly “Sales Huddle Reports” are meetings where managers (trained in

writing reports and tracking, assessing, and reviewing results) assess associates’ progress and track all Single Sales Objectives (SSOs) in the Sales pipeline. Managers provide support to help close deals and propel associates to success.

The results: In January 2009, the average amount of time to close a Single Sales Objective was 5.5 months. By June 2010, Oakwood reduced it to 2.5 months. The rate at which it converts prospects to customers has gone from 2 percent to 8 percent during the same time frame. Plus, year-to-date Sales results are up 18 percent over the prior year.

OUTSTANDING INITIATIVES

★ **EMD Serono, Inc.: Virtual Preceptorship**

With traditional preceptorships—where Sales professionals shadow a health-care provider for one day while they attend to patients, meet with their staff, attend grand rounds presentations, etc.—it is difficult to ensure the consistency, quality, and transfer of knowledge gained on each individual preceptorship.

This is why EMD Serono developed the Multiple Sclerosis Virtual Preceptorship, an e-learning program that simulates a live preceptorship using realistic 3-D environments, engaging text, audio, video, animation, and interactive exercises. The program includes a hospital with two auditoriums, one containing three grand rounds lectures and the other containing a health-care provider panel discussion of nine different topics related to MS; a community neurology office with several staff interviews and a patient case study; and an MS clinic with additional staff interviews and two additional case studies.

Some 200 sales professionals had the opportunity to complete this training in 2010.

★ **Jiffy Lube International: Evaluation & Continuous Improvement Program**

In 2010, the Jiffy Lube University Learning Team chose to perform a complete evaluation of JLU, including the e-learning and instructor-led training (ILT) delivered to the franchisee network. The team employed multiple resources to find ways to improve the training:

1. The Bob Pike group evaluated the ILT classes for learning effectiveness. Each member of the JLU Learning Team then took ownership of a single ILT course, making improvements in content, teaching methods, and student activities that were validated by the entire team.

2. The automotive industry organization, National Institute for Automotive Service Excellence (ASE), performed an audit to recertify that the training material and training methods met its standards. Its recommendations were incorporated into the improvement effort.

3. The JLI technical and training experts reviewed the computer-based training materials, and then the Franchisee Training Committee reviewed and revised the updated materials. This effort involved 40 modules and took 10 months to complete.

4. Students from the University of Illinois Human Resources

Master Program reviewed JLU training materials, delivery, and structure. They interviewed JLI management, franchisees, trainers, and service center employees. Their findings were reported back to JLU and used in the improvement effort.

5. The Learning Team also evaluated its own performance and set nine standards (the process was inspired by “The Gold Standard” by Coach Mike Krzyzewski). Team members assess themselves each month against the standards (including communication, passion, commitment to excellence, and innovation), and the Learning Team manager uses the standards as part of the monthly one-on-one employee conversation.

In a JLAF Survey, the overall scope and strategy of the training was validated by a survey of the 200 franchisees: Some 79 percent of the 171 respondents agreed that overall the training meets or exceeds their expectations of providing qualified personnel.

★ The PNC Financial Services Group, Inc.: Accel - Retail Bank Development Program

PNC’s Retail Bank Development Program, known as Accel, is an accelerated development program for recent college graduates with exceptional leadership potential. Accel develops PNC’s next generation of Retail Bank leaders through a 12-month program that provides technical and leadership/professional development training enhanced by experiential learning opportunities.

Accel offers:

- Technical, sales, and service excellence training
- Relationship-building and learning events
- Rotational work assignments
- One-on-one coaching/mentoring
- Networking with top PNC executives
- Fast track to management and sales positions that are incentive eligible

Accel provides employees with four months of intensive training and on-the-job experience. Then participating employees go into the Branch Management or Business Banking track where they receive further training and rotational opportunities to prepare for placement consideration between months nine and 12 of the program.

For every 25 graduates of the Accel Program, an additional \$2.3 million in annual controllable contribution is generated.

★ Quicken Loans: Quicken’s Got Talent

To continually increase mortgage banker phone skills, encourage best practice sharing, and spotlight and reward the best talent in the company, the training team created the “Quicken’s Got Talent” initiative. It was modeled after TV talent show *America’s Got Talent*. At the click of a button, which has been integrated into Quicken’s internal lead management system, mortgage bankers and leaders can submit a recorded client conversation to be considered for the opportunity to win a \$1,000 annual cash prize. Trainers review the call submissions and elect one per day to be

highlighted and rated on a scale of 1 to 5 by Quicken’s 1,200 mortgage bankers. Each month, the mortgage banker with the highest ranked submission receives a prize valued up to \$200 and is spotlighted in a video where he or she faces a panel of judges to determine whether he or she will move on to the next round. Winners then compete for the annual award of \$1,000 that is presented at a formal ceremony recognizing top-producing bankers across the company.

Participation is automatically tracked and recorded through the learning management system (LMS), and all recorded best practices are stored in a “Call Clip Library” that is accessible companywide on Quicken’s intranet, and used for training and coaching throughout the year. Since the inception of this initiative, more than 423 recorded best practice call clips have been made available, and 69,000-plus playbacks have been tracked by the LMS.

★ SCC Soft Computer: Office Support Department Mentoring Program

SCC’s Office Support (OS) manager is responsible for the training and development of the OS team. Because the staff is in a near-constant state of transition, it was determined that the team needed a flexible, detailed, and consistent training and mentoring program.

OS and the Education Services (EDS) Organization Development (OD) team identified those individuals who had achieved success in their administrative role while in OS, conducted interviews with each person, documented the KSAOs (Knowledge, Skills, Abilities, and Other characteristics) that the individual attributed to his or her success, and compiled this information into a competency model that now is used in staff hiring, training, performance evaluations, and promotions.

Each employee’s learning plan includes courses to help cultivate the skills needed for success in his or her position and for promotion eligibility. Team members assisted in developing training checklists used for mentoring new hires. Each new hire is assigned a mentor and completes a KSAO assessment, which is reviewed and compared to the OS model to identify the new hire’s strengths and gaps.

The mentor creates a customized personal learning passport—which looks like an actual passport, complete with the employee’s photo—for the new hire and identifies the areas that require mastery of a particular competency before the mentor signs off on that skill. After signing off on a competency, the mentor is responsible for following up with the employee. Each employee meets with the OS manager every four to six weeks to track training status and discuss any other issues, concerns, or needs. When the employee’s personal learning passport is complete, he or she is eligible for advancement.

Since beginning this initiative, SCC’s OS manager has been able to better identify those individuals who have the necessary knowledge, skills, and abilities for success. This can be measured in the number of promotions from her department into other positions. Other results include lower turnover and higher percentages of employee retention. **■**