

# Tips from the Top

Four top-level learning

executives from *Coca-Cola*,

 **General Motors**, ,

and  gathered at the

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conference in Atlanta.

They **discussed** the skills necessary to be a good business partner in their companies, offered advice about how to **effectively manage** a diverse workforce, and suggested ways to sell employee **development** to company CEOs.

Offering insights and advice on a panel moderated by *T+D*'s Pat Galagan were Bill Byron Concevitch, chief talent and learning officer for Witness Systems; Greg Dardis, director of the leadership institute at Home Depot; Karen Hendrix, director of learning and development at Coca-Cola North America; and Donnee Ramelli, president of GM University at General Motors.

**QI** To be a good business partner, what two or three things absolutely must be in place?

**Hendrix:** To be successful business partners at the Coca-Cola Company, we need to understand the dynamics of our business and how our people efforts impact the business. Consulting with clients around the performance of their people and the relative

business results that are achieved is the foundation. From there, together we can identify changes that will help us better achieve our goals, including increasing the skill levels and effectiveness of our teams. We have used a number of tools to increase our ability as HR professionals with this consulting approach. One is the book *Strategic Business Partner* by Dana Gaines Robinson and Jim Robinson. It presents a simple framework for connecting performance and behaviors in the organization to business results. It also suggests ways to ask the right questions about the business and to look for gaps between actual and expected results.

**Dardis:** I think to be a good business partner, you've got to speak the language of business and understand the business as well as the leaders do. If their focus is on the financials, then that's

what they want to hear about, not the latest learning management system. [Home Depot] is very metrics-driven and focused on execution. The business leaders expect the learning group to be equally focused on solutions, especially speedy solutions.

**QI** You mentioned being able to discuss financials. Do you have any advice on how to develop that skill?

**Dardis:** If you're not financially savvy, I would suggest that you work with people in the company to understand the financials. Our leaders often talk about what Wall Street expects. If you don't understand those expectations and that language, you won't be able to add value.

**QI** Many companies today are concerned about the

“Training and development is like any other business unit: You’ve got to prove your **value** to the business.”

—Bill Byron  
Concevitch

Chief talent and learning office  
Witness Systems



threat of a skills gap. They wonder how they’re going to find, hire, retain, and develop the employees they need to achieve their goals for the future. Are you facing a skills gap in your companies? What are you doing about talent management, beyond outsourcing certain jobs?

**Ramelli:** At GM we’re working to be more global and to expand our global footprint. That led us to integrate the strategic planning function [across the company], and to understand the skill levels and gaps we have in various functional areas and how we are going to close them. Is it recruitment? Is it development? Is it transfer of knowledge? Is it international assignments? And then, how do we capture that learning and make sure it stays with the organization? So I think integration, starting from the planning stage, is important.

**QI** In a big global company grappling with talent management, where does the responsibility lie? Is it shared jointly across the company? Does it reside with training or with HR?

**Hendrix:** It’s a joint accountability. Leaders of the business, including HR executives, are responsible for talent management. We have a Center of Excellence that is responsible for the processes to help do that. Beginning in 2005, we put rigorous routines, called People Development Forums (PDFs), in place to manage our internal talent and increase focus on developing talent from within. We wanted talent management routines—similar to financial management routines—that help the business manage our talent as an asset. These forums operate at all levels of the business from the executive committee through our critical functions, such as marketing and our operating groups responsible for our business across the globe.

PDFs are groups of leaders, facilitated by HR professionals, who periodically

review the status and progress of our talent. They review the current and future needs of the business, the strengths and gaps of critical skill sets in our people, and the demographics of the workforce in general as well as at the Coca-Cola Company. PDFs use this data to develop strategies and plans to identify, develop, and move the right talent to the right roles in the business to achieve our business goals and to provide meaningful development experiences for future roles. This process also shapes our sourcing and recruiting strategies externally.

**QI** The business media have been covering India and China extensively as more companies expand there. Moving into relatively unknown and fast-changing cultures poses some particular challenges, even for companies that have operated globally for a long time. What’s your perspective on operating in these cultures?

**Concevitch:** I’ve noticed that people from outside the United States do a better job trying to understand our culture than we do to understand theirs. One of our customers, a very large call center operation, was outsourcing to India. They brought agents to the United States for three months. In addition to training them on handling calls, they encouraged trainees to do things on weekends that their callers might do—go to malls, go to movie theaters, or grab a cup of coffee at the local Starbucks.

If we’re going to be global, we need to understand and thoroughly appreciate cultural differences and commonalities. We need to be aware that people don’t necessarily identify with a single culture.

**Dardis:** Home Depot is currently moving toward doing business in India and China. It’s exciting and challenging for us. We are making a big effort to immerse our folks in multiculturalism and prepare them to interact with

people in other countries in person and on the phone.

**QI** Currently there are at least four generations in the workforce that are very different in their needs, their behaviors, their wants, and their abilities to learn. How do you play to their respective strengths and keep them all engaged?

**Ramelli:** [At General Motors] our leadership has just looked at this issue and at our current and future demographic and diversity profiles. That has raised the bar on making sure we have an engaging environment where people know they have an opportunity and where they will have challenging things to do. Too much command and control takes away people's initiative and wears down their creativity and innovation. So, I think one of the things to look at is how we can build a high-engagement environment.

What do the leaders look like in that environment? Effective leaders know how to deal with individual differences in a positive way. They know how to build trust. They know how to listen. They know the right approaches to individual development and how to assure each person's contribution.

Many facets of our business are changing as we watch them, so talent management is a big issue for us, and I think we don't have the silver bullet. But I think that over the long term, having focus and building trust and high engagement make the right things happen.

**Hendrix:** We have put a next generation leadership module into one of our formal leadership programs for our most senior leaders. We identify 10 to 12 next generation leaders, each with less than five years with the company and all typically less than 35 years old. The session is a facilitated conversation between the two groups. It starts with basic questions: "What do you do on the weekends?" and "What kind of music do you listen to?" Then we

ask, "Why did you join the Coca-Cola Company?" and "What kinds of things are you looking for in your leaders?" It helps our senior leaders understand what is important to the next generation of leaders. The dialogue is very open and helps clarify similarities and differences between the various generations in our company.

**QI** In a series of interviews published in *T+D* over the past two years with CEOs of leading companies, we have been exploring the connection between learning and strategy.

One question we always ask the CEO is "How do you assign value to your learning function? How do you know that it is working?" How would you answer that question? How do you prove your value?

**Concevitch:** We have senior leadership up to the CEO and chairman of the board who believe in learning. That's really fortunate but it also means they challenge its value and whether it's a worthwhile investment. It helps to understand their expectations and measurements for success. And as a learning organization, we attach ourselves to their most important priorities and objectives. We ask them: "What's the outcome you're looking for?" If we deliver that, they'll agree it was a success.

**Ramelli:** I think getting the chairman, CEO, and the key leaders teaching in the classroom is a triple win. They get to talk about what's important to the business. They get to hear what the leaders think. They learn a lot from being in the classroom. The important thing is to get them involved. Get them engaged in delivering learning and you can't go wrong.

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“By focusing on the performance changes that are desired and how those changes will impact the business, you can gain greater clarity on how to best evaluate the impact.”

—Karen Hendrix  
 Director of learning and development  
 Coca-Cola North America



**Dardis:** I’m very lucky to have a lot of senior leaders who have bought into learning, but we’re a cost center. If learning isn’t delivering, then we’re not part of the business. If we’re not measuring it, then it’s probably not going to have a lot of teeth or traction. But, I also think we [workplace learning and performance professionals] have got to market what we do. But you can’t be bragging about your value unless you can back it up.

**Hendrix:** By focusing on the performance changes that are desired and how those changes will impact the business, you can gain greater clarity on how to best evaluate the impact. At a more basic level, you can use the experiences of the people in the programs to identify and communicate specific value back to the organization. We have used a simple question via email or voicemail: “Is

there anything that you were able to do as a result of this program that you wouldn’t have normally done? If so, what was the impact on your performance and the business?” Sharing these real examples is a very effective way to demonstrate the business value to others.

**QI** When you first went to your CEO to convince him to spend face time developing leaders, how did you make the case?

**Ramelli:** I didn’t have to. He wanted to do it from the day we met.

**Dardis:** I didn’t have to either, but one time I had to make my case to the board of directors. It was all framed in terms of the business case so they got it. But before they were going to commit millions of dollars, they wanted to



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treat it with a lot of due diligence like any other investment.

**Concevitch:** I didn't have to sell [the emerging leader program], but our CEO had a lot of concerns about the expectations of the participants regarding raises and promotions and the implications of being selected or not selected for the program. Once I addressed those concerns, things just catapulted.

When we select someone to be in an emerging leader program, for example, we spell out that the program is meant to improve skills for use in their current position. We also ask their direct manager to sign a commitment form where everything is laid out. Commitment from both is critical to success.

**Ramelli:** We also communicate with the leaders of the people who will probably be in the next round. When the leaders have to tell folks they must wait another year for development, the leaders may see the value of doubling the number of programs.

**QI** A few years ago, if a company had to do layoffs, the learning, training, and development employees were the first to go. How can you make sure your department doesn't get cut?

**Concevitch:** Training and development is like any other business unit: You've got to prove your value to the business. If you prove the value and you have leadership that understands it, the learning people may be among the last to go because of the impact they can have on the people who remain. At least a lot more discussion will take place before any cuts to the team are initiated.

**Hendrix:** We have worked to optimize our ability to flex our resource levels. In our planning, we consider a number of factors to give us the best flexibility to expand and contract with the business's needs. How do we best use

external partners? How do we collaborate with other functions inside the business? How do we take advantage of leaders and experts in the organization in our design and delivery? This gives us an effective way to scale up and scale down resources as the business requires.

**QI** One thing that all business unit leaders are expected to do is to continue to deliver more value every year at reduced cost and with greater efficiency. So, how are you driving cost out or at least showing greater value for the cost you're incurring?

**Ramelli:** When I arrived at GM in 2000, GM University was 85 percent outsourced. During the past six years, we have steadily found ways to streamline the outsourcing by using technology to

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—Donnee Ramelli  
President of GM  
University  
General Motors



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combine things or to insource them. We've concentrated on things that were mission critical rather than nice to have. We've been on a productivity curve that people respected and understood so that when GM had a bad year last year, we were OK. Leaders saw the value [of training]. Now as soon as I write down whatever the budget number is, there will be two global process leaders who run in and say, "I've got to expand my footprint here. I'm adding money." They've already done the value equation. I don't have to prove it to them anymore.

**Hendrix:** With our HR partners, we work with leaders in our planning process to identify the ongoing and future business needs and the implications for people. We look at what we can discontinue or address in an alternative way. We make decisions together on the resources needed for each goal and the funding model for each. Many initiatives are funded on a cost recovery or tuition basis from managers' operating budgets.

**QI** How do you determine your strategic learning and development roadmap so that you have a 12-month or 18-month view?

**Dardis:** I listen to everything I can that's coming from leaders in my company. I read the press to see where the economy is going. I find out what Wall Street is saying. I walk the halls to spend face time with other leaders who have problems to solve. But then I have to decide what plans and tactics will achieve all this visionary stuff.

**Ramelli:** At GM, a strategic plan for each global function identifies gaps, needs, and goals. There's also an operational learning plan for each function that we price out into a budget—after a lot of discussion. As we get into the year, the plans will change. There's an HR leader who integrates these processes across functions. Then, we try to provide them all with the back end,

development, and technology support to actually deliver on the plans.

**QI** When you must show value and make a business case for your programs, what are some key indicators or performance metrics that you use?

**Dardis:** Being in retail, we measure things like sales and loss reduction. We've been able to show—after a large-scale learning event for district managers, where we've provided breakout groups and role plays that gave them opportunities to practice selling, coaching, and giving feedback—that sales took an uptick in the following quarter. I could do traditional four-level evaluations but the business leaders won't really care about that. They care about selling more products. If the learning helps sell more products, then they're on board.

**Hendrix:** When you talk with a business leader about what needs to be accomplished, both behavioral changes and financial results will surface. Through more discussion you can more clearly identify the desired performance changes and the appropriate strategies to enable the organization to move forward. It's important to gain agreement all the way through with the sponsoring leader. This method is powerful because it comes down to what's important to drive the business, and how the change will impact the business objectives of the leader sponsoring a particular initiative.

**Ramelli:** That's the right front-end process. If you design for results and you get them, everyone will recognize it, and you win. Another approach is to tell success stories. I have five stories that show how much GM saved in five different programs for manufacturing, engineering, and so forth. It was in the millions. At some point, when the leaders around the table are nodding in agreement and confirming what you say, the rest become believers. You can

"If learning isn't delivering, then we're not part of the business. If we're not measuring it, then it's probably not going to have a lot of teeth or traction."



—**Greg Dardis**  
Director of  
the leadership  
institute  
Home Depot



just ask for the money you want. I've been lucky to work for two chairmen and other leaders at GM who know the value of investing in people to grow and develop them. **T+D**

*The panel discussion on which this article is based took place at the Sharing@LearnShare conference in Atlanta in September 2006. The panel was moderated and reported by Pat Galagan, executive editor of ASTD; pgalagan@astd.org.*

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