

American Express' Jeanette Harrison: Learning as a Service

Brian Summerfield

Jeanette K. Harrison, vice president of the American Express Learning Network, truly believes in the power of education. She applies this view to her work, which involves preparing thousands of the company's employees to provide exceptional service to customers.

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— Jeanette K. Harrison, Vice President, American Express Learning Network

The stated mission of the American Express Learning Network is to "ready all those who serve." That objective pertains to the approximately 15,000 customer-care professionals within the company's Service Delivery Network, which is responsible for assisting cardmembers and merchants with needs ranging from processing new accounts to card remittance.

Jeanette K. Harrison, vice president of the American Express Learning Network, has spent more than three years leading efforts to better prepare the people who are providing these crucial services to customers. And although she's rolled out a number of initiatives that have contributed significantly to improvements in performance during this time, she's hardly getting complacent.

"We're making progress, but we will not rest on that," she said. "It's simply too important to us to do better each and every day. One of our 2008 objectives in service is to enhance the culture of 'will to learn.' We believe — notwithstanding what we've invested to date — that all of us have to learn as one mechanism to stay ahead of the competition and ensure our customers are as well served as they can be. That gets to the issue of being exceptional. We're not looking for service — we're looking for extraordinary service."

Harrison — who holds a master's degree in student development and higher education administration from American University and a doctorate in public policy from the University of Southern California — began her career in university administration. She



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said this was when she first realized how technology could be harnessed as valuable tool for connecting people with knowledge.

From there, she moved through different development- and performance-related roles, including a stint as the director of knowledge and learning at Intel Corp., before landing at American Express. She said the common thread between all the jobs she has held is they involved driving the performance of people.

"My career has revolved around solving problems where we needed better or greater performance from our workforce," she said. "In essence, I'm a corporate problem solver."

When Harrison first arrived at American Express' Service Delivery Network, she was part of a new group of leaders who had just

joined that part of the enterprise. While this dramatic shake-up in senior personnel might seem precarious, it turned out to be an opportunity to re-examine how the function was running and what needed to change.

"We were a partner in that from the get-go," Harrison said. "That's really allowed us to be a part of the reinvention of American Express' service philosophy and delivery."

The main objectives for the Learning Network involved motivating its employees and restoring their belief that it was a great place to work, balancing technology-based learning programs with more interpersonal and experiential offerings and focusing on customer treatment as the primary target of employee development (as opposed to con-

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NAME: Jeanette K. Harrison

TITLE: Vice President, Learning Network

COMPANY: American Express

SUCCESSIONS:

- Further aligned learning programs to business strategy.
- Elevated professionalism of learning within the service operation with the launch of an instructor development program.
- Implemented and enhanced information repository that supports customer-care professionals across the network.

LEARNING PHILOSOPHY:

"Learning literally changes lives, and not just in the workplace. My hope is that what we do in the classroom is not only changing the lives of those we interact with at work on a day-to-day basis, but also their families, neighbors and communities. I really believe education is the road to a better life."

trol and compliance). Of these, the third was the most substantial change.

"We work in the financial services industry," Harrison explained. "Anytime you're touching your own money — let alone anyone else's — you want control and compliance to be top of mind. That includes privacy of data, data integrity and ensuring appropriate adherence to all regulations and legislation. That has always been fundamental to the learning network's curriculum.

"We wanted to ensure that everyone got that, but also realize that the endgame was extraordinary customer care and focus on treatment. That's been the most exciting and fun thing we've done for the past three years, and it's a journey we're still on today."

Although each of these goals was distinct, there was overlap between them. For instance, Harrison and her team created an instructor development program that helped re-establish the

learning network's self-confidence and increase the amount of live training it delivered.

"They've now been certified as instructors as well as being certified within their area of expertise," she said. "I can now look at my business partners and say, 'Not only are they learning professionals who are recognized by their colleagues in the learning arena, but they also can perform in the top quartile of your business process as well. If you've got exceptional instructors working with your workforce, it makes life a whole lot easier.

"We're a service business, and the coin of our realm is voice-to-voice and e-mail-to-e-mail interaction. These can certainly be facilitated by technology-based training, but we want to be sure that we're instilling that engagement, excitement and passion to serve. Frankly, that's difficult to ensure through technology-based training."

That's not to say that the Learning Network hasn't looked at new ways to use technology as a means to help customer-care professionals. One of the solutions it has developed during Harrison's tenure is a knowledge repository that supplies employees with the information they need, whenever and wherever they need it. This performance support tool is complemented by scenario-based training that helps them figure out how to operate in a complex environment.

"With the plethora of products and services that American Express has to offer, you can imagine the wealth of information that has to go along with supporting all those products and services," Harrison said. "We initially work to make sure that everyone has a solid understanding of how they introduce themselves, how they ensure the appropriate privacy and security levels for all of our customers and how they proceed into the interaction. When customers call us, they have a problem. That might be a question, a need for information or a request for a replacement card, but what we need to make sure of is that we're solving their problem, whatever it might be. So we orient the scenarios toward problem resolution."

Because of the nature of the Service Delivery Network, the organization uses, not surprisingly, customer service as a key performance indicator. It measures this by asking them basic questions such as, "Was your problem solved? Did your customer-care professional have the requisite knowledge to serve you? Was it easy to do business with us?"

This approach has paid off. In addition to improved customer feedback, American Express was given the J.D. Power award for customer service in financial services late last fall. However, while Harrison is happy to accept some credit for this on behalf of the Learning Network, she points out that other functions, such as hiring and compensation, played a prominent role as well.

She should know, too: In addition to her learning responsibilities, Harrison was involved with an exhaustive job-profile assessment. This project lasted 18 months and examined the skills and competencies for every major job type in the Service Delivery Network down to the task level. The function's hiring profile has been significantly impacted as a result, with a new emphasis on candidates' attitudes.

"We want to assess the skills and competencies that have been identified for all of the job profiles to make sure people have the requisite skills," she said. "All of our applicants, regardless of what job they're applying for, have to fill out an online application. It's in-depth, but we want to get to know all of our applicants. Then we have intensive telephone and in-person interviews to look for the right attitude and heart. We believe that we're very good at what we do and we're very committed to it, but it doesn't really matter how much we train if we don't find people who are passionate about work."

Another example of learning's reach within American Express' Service Delivery Network is the fact that it's among the organization's five pillars. That's not just a feel-good pretense, either. Harrison said this structure translates into genuine respect and support for learning.

"We have a process of evaluating strategic investments, and learning has to be included," she said. "If we're going to produce a new product, we need to make sure the funds are there to prepare the workforce to service those products. If we make systems changes, we've got to have resources allocated for training as part of that. We work hand in glove with the entire continuum of organizations that makes up the network. And all of those groups work seamlessly with learning on all the issues that come before us. What's the hiring profile? What's the job model that we're driving towards in terms of skills and competencies? What is the compensation positioning? That's the dialogue we engage in to make sure that learning is seeded in all of those discussions, and it's a great example of how we have immersed the learning network in the business of delivering customer care." ■

— Brian Summerfield,
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