



The Chief Learning Officer: A Retrospective

At certain intervals throughout a particular progression of events, it's helpful to pause and survey the journey thus far. And on the occasion of *Chief Learning Officer* magazine's fifth anniversary, the editors wanted to examine the evolution of the learning executive.

To find out how the responsibilities, challenges and strategies have changed for people who manage workforce development, we turned to two individuals who have been recognized as CLO of the Year by our publication and have reputations as thought leaders in the industry: Defense Acquisition University (DAU) President Frank J. Anderson Jr. and former Caterpillar University President David Vance, who heads his own consultancy.

There were a few common threads between their experiences, with which many other people in their field could likely identify. For instance, Anderson and Vance both said they have seen the learning function become more strategic during their respective tenures — in large part because of their efforts to make it so.

"We founded Caterpillar University in January 2001," Vance said. "The scope that I had did not change in those six years. What really continued to evolve was our approach to learning and our work on changing the culture. Over time, others got a greater appreciation of the impact that learning can have. I think we showed people that we could deliver results and keep focused on what was important in achieving the company's goals."

Anderson, who was appointed president of DAU in 2000, said the organization's mission came from the top.

"The senior leadership wanted us to think strategically about how we could reshape acquisition training and to supply a better-equipped acquisition workforce," he said. "We did a major review of everything about the university from an internal perspective, and then we took an external look in terms of the senior leadership's expectations."

Both Anderson and Vance, however, added that the learning organization's move from a reactive cost center to a strategic contributor to business goals didn't happen immediately. Rather, it took time — and a lot of patience on their part.

"It wasn't immediate," Anderson said. "The first thing we did was put in place some initiatives to clearly think through what we did at that time and then try to develop a more focused view of what both our senior leadership and the acquisition workforce thought we should be doing as a learning institution. It

was understanding what we were doing, how we did it and what resources we had. It has changed in significant ways in terms of scope. We have taken on a broader partnership with our HR organization in terms of talent management and workforce analysis, such as looking at the challenges associated with the baby boomers' departure from the workforce and understanding our own workforce demographics."

At Caterpillar, this move was plagued by perception problems, Vance said.

"The change that I look back on is the change in how we are perceived," he said. "I changed the way we were running the learning function almost immediately, so the learning professionals immediately sensed the change, but it would take several years for the rest of the people in the company to understand what that change meant. In the beginning, people weren't sure what we meant when we said we were going to run learning like a business — it was so different from what had been in the culture before. It just took time for us to come out with programs that were aligned and to get feedback from people saying that these are the best programs they've ever gone through."

"I guess the advice I'd give anyone who just moved into that kind of position would be to have patience to allow that evolution to take place. And it won't happen over several months or even several quarters — it takes several years for that to happen."

A couple of important factors that brought about this sea change in the approach to learning included demonstrations of positive business impact and a willful expansion into the bigger talent picture. With respect to the former, Vance said he thinks a significant portion of the industry continues to lag.

"I still encounter so much resistance to attaching numbers to what we do because there isn't 100 percent certainty around them," he said. "We've got to get people over this. We talk about determining the value of learning and in almost any case, there are other variables at play. Let's say we have a sales training program, and sales goes up 20 percent. Was that all due to the sales training program? Probably not."

"If you designed a well-integrated strategy, you might have adjusted their compensation, hired better people, gotten them a better boss and also gotten a new training program. Some people stop right there and say, 'I just don't know.' We've got to get people past this paralysis. It's OK to estimate and get in the ballpark with regard to the impact something is having. You can do

The learning organization's move from a reactive cost center to a strategic contributor to business goals didn't happen immediately. Rather, it took time — and a lot of patience.

that with conservative and humble estimates that are shared transparently.”

In regard to the broader issue of talent, learning's continued involvement isn't too much of a shock, especially because so many enterprises now recognize the importance of intellectual assets in a knowledge-driven economy. Particularly interesting is how many learning organizations have integrated with other talent functions.

“I had the luxury of really focusing on learning, leadership and competency development,” Vance said. “Succession planning, talent acquisition, workforce planning and organizational effectiveness were housed under a colleague. There were some awkward circumstances. For example, we'd be talking about leadership development, but succession planning (which obviously involves leaders) was housed elsewhere, so we didn't talk about it.

“When I left, I made the recommendation — and my staff agreed — that it was time to integrate other elements of talent management under one person. Given the foundation we had on the learning side, we thought it was time to pull all of these together [in Caterpillar University]. So, my successor really has talent management, as defined at Caterpillar. Now, he doesn't have everything in HR, which also includes compensation and benefits, but you have all the talent management in one place now, which is where I think the profession needs to go.”

Anderson agreed.

“The whole nature of what we do in the learning space is changing because of workforce demographics,” he explained. “The big issues are dealing with the future workplace and how you shape your workforce development strategy to support that environment. When you start to look at national workforce demographics, we know that the national workforce is getting smaller. If you look at what's going on across industries, whether it's the public or private sectors, major organizations are getting smaller. So, how do you optimize the time you have for training and integrate all your strategies relative to the workforce?”

“I believe that's the direction we're all moving in: ensuring very close linkage and integration between workforce development strategy and the acquisition and retention of employees, so that they're part of an integrated whole instead of disconnected functions that are in different places. The idea of talent management is very real, and I think it's the future.” ■

— Brian Summerfield, bsummerfield@clomedia.com

