



MasterCard's MASTER PLAN

To stage the largest face-to-face learning event in its 40-year history, MasterCard Worldwide first had to figure out how to create hundreds of capable facilitators in cities around the world. **By Jack Gordon**

The goal of MasterCard's RoadMap to the Future program was to see to it that every employee around the world understood the corporate business strategy and how MasterCard would be different after its IPO. Here, an employee Roadmap session in Beijing.

AN INITIAL PUBLIC OFFERING IN MAY 2006 completed the gradual transformation of MasterCard Worldwide from a 40-year-old private association owned by member banks to a \$2.9 billion public corporation. For MasterCard's 4,600 employees around the globe, however, the IPO was not an ending but the start of a new way of life.

To guarantee that every employee understood what the

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change would mean, MasterCard staged the largest single learning event in its history—a series of intensive, 4.5-hour seminars conducted under the name, “RoadMap to the Future.” The 110 workshops ran in 36 cities, reaching 96 percent of the employee population within a three-week window beginning shortly after the IPO. At corporate headquarters in Purchase, NY—and in St. Louis, Toronto, London, Stockholm, Brussels, Caracas, Singapore, Guangzhou, and more than two dozen other cities—employees gathered to learn, face-to-face with local managers, what the new state of affairs would entail.

To make these meetings happen at all, never mind ensuring that they would work as intended, the key was to prepare dozens of human resource specialists and hundreds of local managers around the world to act as effective trainers and facilitators. If ever a learning event required a carefully designed train-the-trainer strategy, this was it, says Rebecca Ray, MasterCard’s senior vice president for global learning and organizational development.

What Matters Now?

The goal of RoadMap to the Future, Ray explains, was to see to it that “every employee understood the [corporate] business strategy and how MasterCard would be different after the IPO.” What would change? Which issues or financial indicators would

take on new importance, and why? How would these changes affect goals, planning, and day-to-day operations at the employee’s own office, be it in Stockholm or Singapore?

The training program was anchored by three large, colorful “learning maps,” designed with the help of Toledo, OH, training firm Root Learning Inc. The maps’ titles corresponded to the program’s three main topics. The first, titled “Universe of Opportunity,” described MasterCard’s “competitive landscape,” including “changes and challenges on the horizon for the payments industry,” Ray says. The second map’s straightforward title was “How We Make Money.” It anchored a business-literacy discussion of MasterCard’s financial models, the pieces of the payment industry in which MasterCard participates, and how those pieces fit together.

The final map was called “New Climate, New Culture, New Company.” Here, the training went into detail about MasterCard’s business strategy as a public company and the competencies and actions required to pursue that strategy. The idea, Ray says, was to answer the question, “How will we be successful going forward?” For instance, what would change about the way the company managed relationships with the banks that issued its credit cards and the merchants that accepted them?

The content of the training—the actual information relating to those three general topics—was shaped with heavy


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MasterCard needed more than 200 “table coaches” and 60 master facilitators to run its RoadMap of the Future program. Above, left: Table coach training in St. Louis. Above, right: Master facilitator and table coach training in Singapore.

involvement from MasterCard CEO Robert W. Selander and Chief Financial Officer Chris A. McWilton. Those two executives also filmed an introductory video that opened the seminars. The task of executing the worldwide rollout, however, fell to Ray and Senior HR Vice President Mimi Wood. The seminars were to begin in late June, about a month after the IPO. To pull off the operation, Ray and Wood needed a lot of help.

Training Trainers

Ray wanted the seminars to be conducted with employees gathered at tables seating about 10 people each. Every table would have a learning map. This would ensure that all employees were directly engaged and not just listening to a speaker on a stage.

Each table would require a coach or facilitator who understood the content, was familiar with a specially prepared instructor's guide, and was reasonably skilled at group-process tasks, such as coping with an incurably talkative participant or drawing out a silent one.

At corporate headquarters and at some larger offices with hundreds of people, the training would take place over the course of a few weeks, which meant that some table coaches could handle multiple sessions. Still, when she did the math, Ray knew she would require more than 200 trained facilitators, drawn from the management ranks in three dozen cities.

Who would recruit and train those 200 table coaches? Who would fill in if a table coach got sick or ran into trouble during a session? Who would prep the top managers in each city or region to introduce the sessions before the coaches took over at their tables? Who would handle the logistical challenges involved in arranging for meeting space and shepherding the large learning maps through customs in different countries?

Wood answered those questions by asking 60 of her global HR managers and specialists to act as master facilitators. Now Wood and Ray could train the 60 HR people, who in turn, could recruit and train the table coaches, as well as manage the logistics. Thus, Ray says, “It could cascade from my team to HR to the coaches and then to the employees.”

By April, several weeks before MasterCard went public in late May, the training content was established and the learning maps were complete except for minor details. Ray, Wood,

and two Root Learning consultants flew to St. Louis; Singapore; Brussels (Belgium); and back to headquarters in Purchase, NY, to conduct train-the-trainer sessions for master facilitators.

The bulk of that training took the form of a simulated seminar that showed the HR people how it would work and how to perform the table-coaching duties they would teach to others: The session will open with the video presentation by Selander and McWilton. Here is roughly what the top local executive will say before the table work begins. Here is the table facilitator's guide. Here are key issues to cover and questions to ask. Here's how to handle a person who tries to sidetrack the discussion.

“Most of the HR folks already were fairly comfortable with facilitation and handling groups,” Ray says, so this wasn't difficult for them. And while they learned the table coach's role, they were getting a demonstration of how to teach it to local managers in the same way it was taught to them—by walking through a close approximation of the actual experience.

The training for master facilitators also covered logistics and how to prepare regional executives for their introductory roles. Ray and Wood explained that an online version of the seminar would be created for new hires and for the approximately 4 percent of existing employees who would miss the live events.

During the two-month window between those April face-to-face training sessions and the late-June kickoff, Ray and Wood followed up with live, online sessions—Webinars—for the master facilitators. The headquarters training team also built separate Websites for the master facilitators and the table coaches. The sites offered planning checklists, sign-up sheets, archived Webinars, corrections and updates to information presented in the seminars, people to call upon for help, and sneak previews of the video presentation by the CEO and CFO.

Give Us More!

All of that preparation paid off with a global learning event Ray describes as “wildly successful.” In evaluations afterward, more than 90 percent of employees agreed the program had expanded their knowledge of MasterCard's financial structure and its business strategy. Many longtime employees “said it was the



first time they understood the big picture and their role in it," Ray says.

By popular demand, a new version of the learning-map seminars is scheduled to launch later this year. Instead of describing the corporate strategy, it will drill down on how to execute it.

Since the IPO, Ray says, Selander and McWilton have shared quarterly financial figures with the troops via Webinars that also touch upon new products, relationships with new banks, and more. Small versions of two of the learning maps ("How We Make Money" and "New Climate...New Company") allow individual employees to add their own notes and to record key quarterly results: net revenue, net income, operating margin, and return on equity.

"Those four figures now are posted at the workstation of virtually every employee in the company," Ray says. And business unit managers around the world use the mini-maps to anchor

Change Champions

Trainers often are on the front line in efforts to introduce change in an organization. As a change agent, you need to get buy-in within the first 60 days to get traction for your program. But how do you find champions of change? *Training* addressed this question to Conni Billé, the director of organizational development and training for consulting company LRA Worldwide, Inc.

"The key is to put the right people on your design team or recruit them for the beta class. In a classroom or group discussion, use your observation skills to identify the 'champions of change.' You will need two types: 'inspirers' and 'doers.'

Inspirers are willing to give an opinion without looking around to see what the group thinks. They have energy, passion, and a sense of humor. Watch the body language of others in regard to these people; you will see empathy and relationship, and the emotion of the

speaker reflected in the listener's expression.

Doers may not be the first aboard, but when they sign on, they will see the program through. They are not the first to speak, but when they do offer their opinion, it is well thought out, clearly stated, and the people around the room subtly nod and concur. This person has integrity and influence.

Beware the person who claims to be a champion of change because it is politically expedient but is secretly ambivalent. When the change program encounters the expected dose of resistance, the ambivalent advocate will be the first to jump ship.

The champion is the enthusiastic manager who 'buys in' and signs up his staff members, follows up with them to see how they apply what they learn, and notes and rewards the new skills in performance reviews."

To see the full article, go to http://www.managesmarter.com/msg/search/article_display.jsp?vn_u_content_id=1003618909

local conversations focusing on the question, "What can we do to help improve those numbers?"

The managers now are talking to people with a keener understanding of why that question is important. **T**

United States Postal Service®
Statement of Ownership, Management, and Circulation

1. Publication Title: *Training*

2. Publication Number: 0 4 1 4 - 2 9 3 0 5

3. Filing Date: October 1, 2007

4. Issue Frequency: Monthly

5. Annual Subscription Price: \$75 US; \$99 Canada/elsewhere

6. Number of Issues Published Annually: 12

7. Complete Mailing Address of Known Office of Publication (Not Printer): 775 Broadway, New York, NY 10003-0005

8. Complete Mailing Address of Headquarters or General Business Office of Publisher (Not Printer): 775 Broadway, New York, NY 10003-0005

9. Full Names and Complete Mailing Addresses of Publisher, Editor, and Managing Editor: Publisher: Joyceann Conroy-Garjpe, 775 Broadway, New York, NY 10003-0005

10. Owner: Conni Billé, 775 Broadway, New York, NY 10003-0005

11. Known Bondholders, Mortgagees, and Other Security Holders Owring or Holding 1 percent or more of Total Amount of Bonds, Mortgages, or Other Securities: None

12. Tax Status: For-profit

13. Publication of Statement of Ownership: Yes

13. Publication Title	13a. Issue Date for Circulation Data Below	14. Issue Date for Circulation Data Below
13. Issue Date for Circulation Data Below	13b. Issue Date for Circulation Data Below	13c. Issue Date for Circulation Data Below
1. Total Number of Copies (Net press run)	3784	4137
2. Paid and/or Requested Circulation	3616	3824
3. Total Paid and/or Requested Circulation	3616	3824
4. Free Distribution Outside the Mail	168	0
5. Total Free Distribution (Sum of 4, 10a, and 10b)	168	168
6. Total Distribution (Sum of 3 and 5)	3784	4000
7. Copies not Distributed	100	137
8. Total (Sum of 6 and 7)	3784	4137

14. Signature and Title of Editor, Publisher, Business Manager, or Owner: *Joyceann Conroy-Garjpe*, Date: *9/17/07*

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