Learning Business Partners

How good are we at linking learning to business?
Corporate Learning and Development (L&D) organisations are being increasingly urged to demonstrate and improve the business case for L&D initiatives. This should be considered both a challenge (with respect to the scrutiny of resource use) as well as an opportunity (since L&D initiatives can be positioned as investments in people and organisations, not just an expense).

This becomes an even bigger challenge in large multinational firms where corporate learning functions are increasingly tasked with the functional integration of L&D and maximising the return on learning for the business.

This in an environment where business lines interact with geographies, in which a corporate L&D organisation frequently acts alongside local L&D providers, where silo thinking and duplications are often the result, and internal clients have no single integrated partner for learning.

Which business model do we need to respond successfully to this challenge? How can we align the different departments and initiatives to channel investments into the key capabilities needed to drive top and bottom line impact? How do we form a functionally integrated team of learning professionals collaboratively acting as a single, strategic partner to the business?

An L&D organisation can only act as a true partner to the business if its professionals are capable of living this role on a daily basis. Learning Business Partner, Performance Consultant, Learning Advisor are only a few of the functions created in these emerging models to ensure optimal learning solutions are contracted, designed and deployed based on a sound understanding of the client’s business challenges and priorities and at the same time optimising learning spend across the firm.

“L&D professionals capable of establishing and maintaining a trusting relationship with business executives, and with the ability to challenge assumptions, are key to the strategic alignment and impact of learning”
L&D professionals and organisations capable of establishing and maintaining a trusting relationship with business executives, and with the ability and courage to challenge assumptions, are key to the strategic alignment and impact of learning. Developing learning professionals and teams to act as true sparring partners to the business is a challenge many L&D organisations are now facing.

This Global Focus supplement features articles from leading academics covering the pressures on learning functions to deliver real added value, the roles learning functions now play, how they are embedded and anchored within organisations, and what demands these issues make on learning leaders and professionals.

A second set of articles starts with the work done within EFMD’s communities and inventorises how companies are adapting to all of these evolving requirements in their day-to-day L&D practices.

A special thanks is in order to the companies (and their representatives) which contributed in different stages of the process and especially to Capgemini University as a prime contributor to EFMD’s Learning Business Partner Special Interest Group. A Final Report on this LBP SIG was formalized and made available to EFMD members in 2012.

At the end of this supplement we launch a follow-up on the work done on business partnering: a Special Interest Group on L&D Co-Design zooming in on the partnering practices during the initial analysis and contracting stage of a learning & development project. We hope to meet you there!
Only around 20% of business leaders are satisfied with their learning function’s performance. Shlomo Ben-Hur analyses why and how that perception can be improved.

Last year, a survey found that more than 50% of managers believe that employee performance would not change if their company’s learning function were to be eliminated. Some people laugh on reading this: it seems to play to their stereotypes about corporate learning.

Right up to the moment they remember how much learning costs. Then they stop laughing because it often costs a lot.

Figures suggest that globally over $200 billion is spent on corporate learning each year and it seems that the general feeling is that over $100 billion of that may well be wasted. Indeed, over the past ten years survey after survey has repeatedly shown that the proportion of business leaders who are satisfied with their learning function’s performance is around 20%.

The stark reality is that by and large corporate learning is just not working as it should and has not been for some time. All of which begs the question: what do businesses need to do to turn things around and finally make learning work?

This is not a new issue; but it is one that can no longer be ignored. Fuelled by downturn-driven budgetary pressures and apprehension about the efficacy of learning interventions, demand for evidence of the impact and value of learning is growing fast.

Of course, for anything to change there must be some recognition that there is a problem – and not everyone appears convinced of the need for change. For example, surveys of learning leaders show that they report their biggest challenge to be demonstrating the value of their work.
There is no doubt that demonstrating the value of corporate learning is a challenge. But I am surprised that it comes out as the number one concern. My fear is that that reveals an assumption that there is nothing wrong with what is being done at present, that value is already being added and that poor satisfaction ratings are somehow not a fair reflection of what is being achieved. It is as if the issues are skin-deep - challenges of presentation and political positioning more than the substance of how learning works.

I could not disagree more. I am certain that the learning profession can, and often does, add value. Yet I also believe that the poor standing of corporate learning is not just about presentation. Top to toe, something is wrong. With satisfaction levels hovering around 20%, merely doubling or trebling them will not be sufficient. We need to quadruple them, improve them by a staggering 400% before we can start saying that corporate learning is in a good place.

So what has gone wrong and what do businesses need to start doing? I have spent the past few years exploring this very issue and in the book *The Business of Corporate Learning: Insights from Practice*, I describe in detail what the major challenges and opportunities are. From all my research, five key priorities stand out – five critical things that businesses absolutely must do to make learning work.

**Focus on behaviour change not learning**

For the most part, people tend to talk and think about corporate learning in the same terms as traditional, academic learning. It is assumed to be about the accumulation of knowledge or the acquisition of skills. Yet viewing learning this way misses the point that it is not skills or knowledge *per se* that provides value to organisations but how they are applied.

This does not mean that there is no place for traditional academic learning in organisations. But we need to recognise that in the majority of organisations much of corporate learning is not about traditional learning but about changing people’s behaviour in ways that produce value for the business.

The importance of this is that behaviour change is at present surprisingly absent from discussions of best practice in corporate learning. The rising application of behavioural reinforcement techniques such as gamification give cause for hope, as does the increasing influence of disciplines such as behavioural economics.

So there is some change afoot, but it is too little and too slow. To make real gains corporate learning needs to shake off the shackles of its past, recognise that it is fundamentally different from academic learning and thereby free itself to face up to the real challenge before it.

**Focus on functional alignment**

Much of the thinking about corporate learning during the past decade has been about how it needs to be strategically aligned with a company’s business objectives. And this is undoubtedly important. But in order to translate such strategic alignment into operational results, learning functions also need to focus on how their internal systems, processes and people are functionally aligned both with their objectives and with one another.

This may sound obvious but it is too often assumed or overlooked. For example, a key question every learning function needs to be able to answer is: “How do we create value for the organisation?”.

How you envisage the role of corporate learning in creating value in the organisation can have significant implications for how it should be structured and organised. My concern is that in too many businesses, the scramble to align learning with business strategy has led to the internal, functional alignment of the learning functions being overlooked. This has to change.
Making corporate learning work

Step in and out of the business

The third priority is to optimise the relationship between learning teams and their customers in the business. The late psychologist Bruno Bettelheim once allegedly said that the challenge in changing another’s behaviour is not so much being able to step inside the client’s head – to understand their motivations and thinking – as being able to step out again in order to think objectively about what needs to happen. In my view, this is exactly the issue now facing corporate learning.

With all the focus on aligning with business needs, demonstrating value to the business and developing organisational capabilities, there is the risk that learning functions can step in too far and lose their ability to be objective about what needs to happen.

If they are to achieve and retain credibility, learning functions have to find a way to balance the need to be an integral part of the business with an equally strong ability to step outside it, take an objective view and apply, without bias, their expertise in learning science and behaviour change to the task at hand.

Apply market forces

Corporate learning is effectively a market with competing products and services and if we want quality to prevail we need to apply market forces. By this we mean that businesses need to be able to compare products and know what works and what does not so that they can make informed decisions. And to do this, they need to focus on our fourth priority.

Herein lies a problem: corporate learning has spent much of the past 40 years discussing how best to improve evaluation but without actually making any great headway.

Faulty and incomplete models, limited resources and a lack of expertise have all been cited as culprits. Yet after four decades of inertia, we cannot help but wonder if there is a lack of will in play too – a general lack of desire to evaluate. After all, it is in very few stakeholders’ interests to find out that a learning programme has not been successful.

Of course, any reluctance on the part of learning functions here occurs in the broader business context of failure not being tolerated or at least not forgotten. So any improvement in evaluation practice is unlikely to happen until businesses understand that learning is a complex task that usually does not work perfectly at the first attempt and needs to be evaluated and honed over a period of time.

This message may not be easy to hear in many business environments but it needs to be heard. Without proper evaluation we cannot apply market forces and without this we cannot make informed decisions. And without that, corporate learning can never improve.

Share accountability for learning

Research into corporate learning has persistently thrown up a critical but often unrecognised finding: namely, that contextual factors such as the workplace environment are actually more important in ensuring the application of learning than the quality of the learning event. This is pretty staggering when you think about it.
Many businesses would say that they fully understand and appreciate this fact. But we are unconvinced. In a recent survey, 71% of respondents stated that their organisation expects managerial support as part of the learning process. However, when asked what they actually expected managers to do, 63% stated that they are only required formally to endorse the programme. And only 23% reported that managers have to physically do something such as hold pre- and post-training discussions.

Saying ‘I support you’ while doing nothing to back it up is not support and businesses need to start accepting and understanding this.

My final priority, then, is that the responsibility for ensuring that learning happens, behaviour changes and that performance is indeed improved needs to be shared among all the parties involved. If they want learning to work, businesses must not and simply cannot assume or implicitly reinforce the idea that corporate learning is only about learning teams ‘doing something’ to employees.

These five priorities are at the heart of what corporate learning needs to do to make learning work. And when I present these ideas to learning leaders they do not, generally speaking, disagree. The jump from learning to behaviour change is bigger for some than for others but as yet there have been no gasps of disbelief or outraged cries of denial.

Indeed, what seems to concern learning leaders most are not the ideas themselves but how to implement them. On the last two points, in particular, we have heard the occasional sharp intake of breath or long sigh at the thought of strong impact evaluation or creating greater visibility around the business’s role in the learning process.

But businesses and learning leaders do need to act and act soon. Change is needed now more than ever because the development and deployment of learning solutions is becoming more challenging by the year. Organisations are increasingly expecting more for their learning money: moving to more cost-effective solutions, demanding faster design and delivery cycles, and more accessible content. All of which places pressure on learning solutions by creating greater need for compromise in their development and deployment.

So we have a crisis but it is not all doom and gloom. Indeed, I have great hope, because as skill shortages and decreasing opportunities to achieve competitive advantage drive businesses to look internally, learning leaders have the attention of their organisations like never before. They may be under greater pressure to deliver but they also have the stage and the opportunity to put things right.

Saying “I support you” while doing nothing to back it up is not support and businesses need to start accepting and understanding this.
Strategic HRD and the role of Learning Business Partnership

Sabine Seufert and Christoph Meier say there is still some way to go before HR professionals really become strategic business partners.

In their seminal book *The HR Value Proposition* (2005), Ulrich and Brockbank made a strong statement that human resources (HR) practices need to create value in the eyes of key stakeholder groups: investors; customers; line managers; and employees. For them, the key elements for value creation by HR are: knowing external and business realities; serving external and internal stakeholders; crafting HR practices; building HR resources; and ensuring HR professionalism.

Ulrich and Brockbank also discuss different roles for HR professionals (see Figure 1) and have placed the role of HR as "strategic (business) partner" firmly on the agenda.

The HR role as "strategic (business) partner" is focused on assisting (partnering with) line managers in order to achieve line business goals and it entails:

1. crafting strategies related to customer requirements and alignment of line resources to meet these requirements
2. alignment of HR systems to help achieve business line goals
3. diagnosing problems and implementing change
4. advising and coaching line leaders and general facilitation
5. disseminating learning and ideas across the organisation


Strategic human resource development and Learning Business Partnership

More closely focused on the learning function than Ulrich and Brockbank is the work on "strategic human resource development" (SHRD) initiated by Garavan (1991) and taken up by others (for example, McCracken / Wallace 2000, Wang 2011).
The key elements for value creation by HR are: knowing external and business realities; serving external and internal stakeholders; crafting HR practices; building HR resources; and ensuring HR professionalism.

SHRD is about the management of training, development and professional education interventions so as to achieve the objectives of the organisation. It is concerned with the management of employee learning in the long term, keeping in mind the explicit corporate and business strategies (cf Garavan, 1991, p17). The elements of this approach are represented in Figure 2 and can be understood as an “operationalisation” of Learning Business Partnership.

The elements represented in Figure 2 have been operationalised as elements of an evaluation tool for SHRD initially developed by Lee (1996) and further developed by Wang (2011).

According to this instrument, features of SHRD are, among others, training and development (T&D) needs assessments, written T&D plans, integration of training with business strategy, with recruitment and selection, with performance appraisals, and with retention measures as well as training and learning representing processes of strategy formulation.

Empirical results derived from the scil research on learning and development

Empirical results on the L&D model

In the context of a one-year innovation circle on future-oriented learning and development, in 2012 the Swiss Centre for Innovations in Learning (scil) applied the evaluation model developed by Lee / Wang to a panel of nine partners representing the learning functions of Airbus, Allianz, AXA Winterthur, Bayer Business Services, Bundesamt für Statistik (Schweiz), Deutsche Telekom Training, Die Schweizerische Post, Helsana Versicherungen and Swisscom. The results are presented in Tables 1 and 2.

The results of this research indicate that most of the partners in this innovation circle are positioned at level four on the scale proposed by Lee and Wang: training is a means of implementing corporate strategy and achieving change. In two cases, the learning and development (L&D) function can be considered to operate at a level where it also helps shape corporate strategy.
Strategic HRD and the role of Learning Business Partnership

<table>
<thead>
<tr>
<th>L&amp;D Architecture</th>
<th>Case 1</th>
<th>Case 2</th>
<th>Case 3</th>
<th>Case 4</th>
<th>Case 5</th>
<th>Case 6</th>
<th>Case 7</th>
<th>Case 8</th>
<th>Case 9</th>
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<td>9. Integrating L&amp;D with business strategies</td>
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<td>13. Expanded Trainer roles (as “change agents”)</td>
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<td>0</td>
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<td>14. Strategic partnerships with line management</td>
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<td>2</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>11</td>
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<td>15. Top Management Support</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
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<td>2</td>
<td>1</td>
<td>2</td>
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<td>12</td>
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<td>16. All levels of management taking proactive role in organisational learning</td>
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<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
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<td>17. Training and learning shape strategies</td>
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<td>0</td>
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<td>1</td>
<td>1</td>
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<td>18. Training and learning are processes of strategy formulation</td>
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<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>6</td>
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<td>19. Support learning as part of organisational culture</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>20. Environmental scanning, trend watching and best practice analysis</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>1</td>
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<td>TOTAL evaluation scores</td>
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<td>22</td>
<td>24</td>
<td>19</td>
<td>30</td>
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<td>4</td>
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<td>3</td>
<td>5</td>
<td>4</td>
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</table>

Values that can be given at each category: 1 = “no such practice”, 2 = “having such practice but not regularly conducted”, 2 = “yes and constant”

<table>
<thead>
<tr>
<th>SCORES</th>
<th>STRATEGIC</th>
<th>LEARNING &amp; DEVELOPMENT MODEL PROPOSED BY LEE (1996) &amp; WANG (2011)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0–7</td>
<td>Level 1</td>
<td>No systematic training</td>
</tr>
<tr>
<td>8–12</td>
<td>Level 2</td>
<td>Isolated training</td>
</tr>
<tr>
<td>13–18</td>
<td>Level 3</td>
<td>Training integrated with operational management</td>
</tr>
<tr>
<td>19–27</td>
<td>Level 4</td>
<td>Training is the means of implementing corporate strategy and achieving change</td>
</tr>
<tr>
<td>28–35</td>
<td>Level 5</td>
<td>Training and learning possibilities help to shape strategy</td>
</tr>
<tr>
<td>36–40</td>
<td>Level 6</td>
<td>Training and learning are processes through which strategy is formulated</td>
</tr>
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</table>
These results are based on a very narrowly defined target group. A much larger target group is addressed by the trend studies on issues in managing learning and development that have been carried out by scil since 2005.

**The scil trend studies on learning and development**

Scil has been conducting empirical research on trends and challenges in educational management since 2005. The framework underlying this research focuses on six aspects of educational management: strategy; didactics; organisation; culture (of learning); technology; and economy.

The experts interviewed on the basis of a standardised questionnaire are recruited on the basis of theoretical sampling for the following criteria: representation of businesses from different industries; representation of different sizes of businesses; decision makers in corporate learning and development; experts on innovative areas in L&D.

The experts are asked to rate both the importance of specific items and also to estimate the time frame for realisation.

In the most recent study, completed at the end of 2012 (Diesner/Seufert 2013), 150 experts, mostly from Germany (49%) and Switzerland (44%), participated. The respondents were mostly business leaders (12%), leaders of T&D (39%), and learning professionals /programme managers (43%).

Businesses ranging from fewer than 100 to more than 100,000 employees are fairly evenly represented (the largest slice being made up of businesses with 1,000 to 5,000 employees).

A wide range of industries is represented, with the largest group of experts coming from the financial services industry.

The top ten topics for training managers revealed by the survey are shown in Table 3. The area ranked most highly in terms of its importance/relevance is the proactive alignment of staff qualification with corporate strategy, an aspect that is closely related to the concept of strategic business partner as defined by Ulrich & Brockbank.

### Table 3: Top Ten Topics for Training Management in the SCIL Trend Study 2012 (Diesner/Seufert 2013)

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Aspect</th>
<th>Domain</th>
<th>Score*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Align the qualification of staff proactively with corporate strategy</td>
<td>Strategy</td>
<td>1.32</td>
</tr>
<tr>
<td>2</td>
<td>Design learning and educational activities support transfer (eg setting personal learning goals, action plans, follow-ups)</td>
<td>Pedagogy</td>
<td>1.38</td>
</tr>
<tr>
<td>3</td>
<td>Consider current trends and developments when further developing services</td>
<td>Strategy</td>
<td>1.43</td>
</tr>
<tr>
<td>3</td>
<td>Foster learning support through managers / executives</td>
<td>Culture</td>
<td>1.43</td>
</tr>
<tr>
<td>5</td>
<td>Improve interdisciplinary competencies of employees</td>
<td>Pedagogy</td>
<td>1.55</td>
</tr>
<tr>
<td>6</td>
<td>Use managers/executives in educational processes as coaches, mentors, or multipliers of learning-oriented values, expectations and attitudes</td>
<td>Culture</td>
<td>1.59</td>
</tr>
<tr>
<td>7</td>
<td>Involvement of learning and development in implementing strategy after defining strategy-planning processes</td>
<td>Strategy</td>
<td>1.63</td>
</tr>
<tr>
<td>8</td>
<td>Intensify quality development and quality management</td>
<td>Economy</td>
<td>1.64</td>
</tr>
<tr>
<td>9</td>
<td>Improve the pedagogical quality of learning services / offerings</td>
<td>Pedagogy</td>
<td>1.65</td>
</tr>
<tr>
<td>10</td>
<td>Align learning activities to a competency model</td>
<td>Pedagogy</td>
<td>1.66</td>
</tr>
<tr>
<td></td>
<td>Further develop the culture of learning through targeted initiatives</td>
<td>Culture</td>
<td>1.66</td>
</tr>
</tbody>
</table>

*1 = highly relevant; 4 = not relevant

### Figure 3: “What is the Role of Corporate L&D in the Future?”

Results from 2008 to 2012 (Diesner/Seufert 2013)
Strategic HRD and the role of Learning Business Partnership

The investigation of strategic aspects of the management of the L&D function in the sci trend study also covers the role that the L&D function should take on in the future.

The following roles were presented for selection:

• provider of services (i.e., training and personal development)
• change agent and facilitator of change processes throughout the organisation
• business partner
• provider of ideas and impulses for change (i.e., innovator)

The experts were asked to distribute 100 points across four roles—service provider, change agent/facilitator of change processes, business partner, generator of ideas innovator—according to their personal perception of relevance. As this question was included in the trend studies in 2008, 2010 and 2012, it is now possible to compare results for the last few years. (See Figure 3.)

The results indicate that in the perception of the experts interviewed, corporate L&D is an “all-rounder,” a function that takes up a range of roles within the company/corporation: service provider; change agent; business partner; innovator.

While in 2008 the role of “business partner” received the highest rating in terms of relevance by 2010 and 2012 the four roles were given almost equal importance. This nearly equal rating of all four roles now appears to be fairly stable. This suggests that, for the time being, the definition of the role of corporate L&D is dealt with and the focus is on further professionalisation of these four roles.

Trainees also need to take on a more extended role that comprises not only the planning and delivery of training but the delivery of recognisable results to a business unit.

The field for action

So what can we derive from all this regarding SHRD and Learning Business Partnership (LBP)?

First, SHRD and LBP entail a multitude of activities including not only assessing learning needs, writing up development plans, and conducting and evaluating training but also integrating L&D with business strategies, with performance appraisals, with recruitment/selection and with talent management.

Second, SHRD and LBP entail intensive networking and stakeholder management—i.e., line managers, with other HR teams and with top management.

It also makes sense to differentiate the domain controlled by L&D from the domains where co-operation with other units is necessary.

In the first domain, a highly relevant area for improvement is environmental scanning and dealing with new trends in a systematic way (i.e., the item ranked in third place in the 2012 trend study, Table 3).
Another area for development concerns the portfolio of services offered by the L&D function in addition to training – for example initiatives that further develop the culture of learning and the context conditions for learning (cf the item ranked in tenth place above).

Trainers also need to take on a more extended role that comprises not only the planning and delivery of training but the delivery of recognisable results to a business unit. This entails an increased concern for needs assessment and for contracting with line managers. This also means increased involvement in the transfer of learning to the workplace and in the determination of change in the workplace.

In a more general vein, what is required of L&D in order to fulfil a LBP role is the adequate management of the portfolio of services, the provision of effective learning designs, the development of learning professionals, the involvement of business leaders in development activities, the further development of the culture of learning and the demonstration of the value provided (cf Figure 4).

However, the field for action also comprises areas where L&D is required to co-operate with other units. An important element here, for example, is to better integrate L&D with other HR units, in particular, recruitment and selection, performance appraisal and talent management.
The sophistication of human resources: the learning leader’s challenge

The human resources development function has enjoyed something of a “golden age” over the past decade. But, say Annie McKee and Stanton Wortham, we must work hard to maintain it.

Over the past ten years we have seen a substantial and welcome change in the human resources (HR) function in both the private and public sectors. The function has come of age.

We are in a much better place now when it comes to the people side of organisational development. But we are not done yet. The sophistication of HR could be just an accident of timing. The sheer numbers of talented (and ageing) baby boomers in many large, Western organisations at the moment means that we have experienced people in many top jobs, including those in a particular area of human resources — learning and leadership development.

And these individuals have been educated, certified and otherwise trained in all things related to people and organisations, like their peers in other parts of the corporate world. They have MBAs, executive coaching certifications, degrees in organisational development and even executive doctorates — such as the one offered by the University of Pennsylvania, which position them to be Chief Learning Officers in the C-suite.

But what happens when these individuals leave their jobs, as they inevitably will? What must we do to make sure that this trend toward sophisticated learning and leadership development professionals continues?

The answer to these questions starts with a mandate: we need to act now.

As a result of the (busy) bubble of the early 2000s and the massive cutbacks that followed the economic crisis, organisations have drastically reined in on developing their people, including the people responsible for managing learning architectures and conducting learning programmes. Training programmes have dried up and the better, more innovative leadership development programmes have been watered down. Coaching is still offered by many organisations and may even be on the rise — but it’s usually reserved for top business leaders not the people in charge of the learning function.

Paradoxically, development has been cut just when leaders need it most. The world has changed dramatically and the pressure to lead in new ways is intense. Technology, globalisation, shifts in the balance of world economic power and rapidly changing demographics affect virtually every aspect of HR. It is crucial that all of us learn to lead in this new world.

So, as a talented HR leader, what can you do to lead effectively in the 21st century? We have looked at two ways you can ensure your personal effectiveness. First, you need to develop your technical HR skills. Second, you need to develop your leadership skills — particularly your emotional intelligence. Let us look at each of these in turn.

Develop technical learning and leadership development skills

Learning and leadership development professionals usually reside in the human resources function. More recently, these jobs are often tied to talent management (a term used more and more
Paradoxically, development has been cut just when leaders need it most. The world has changed dramatically and the pressure to lead in new ways is intense.
The sophistication of human resources: the learning leader’s challenge

Become a leader in your own right

The technical competencies discussed so far are basic: they enable you to be accepted as a competent professional by your line manager peers. But, as in any profession, threshold competencies are necessary but not sufficient. To become an exemplary learning and development professional you need to be a leader. But what, exactly, do you need to develop?

Our research indicates that today’s leaders must develop several key cognitive and emotional competencies in order to be effective.

For example, in this rapidly changing world, you need to hone a competency we call “pattern recognition”. As our colleague Richard Boyatzis points out in his work, pattern recognition enables you to see order in chaos. Pattern recognition enables an HR leader to read trends that affect people in the organisation. It enables you to see things like the impact of strategy on people, general management development needs, and demographic changes in the employee base. These cognitive competencies are part of being a smart learning and development leader.

As important as they are, however, being smart in the traditional sense is not enough when it comes to leadership. Research indicates that the competencies that differentiate outstanding leaders are related to emotional intelligence (EI). In our work, we look at EI competencies related to self-awareness, self-management, social awareness and relationship management, as seen in Figure 2.

The research on EI is conclusive: these competencies differentiate outstanding leaders from average ones. Let us look at five competencies that are particularly important for HR leaders, and learning and development professionals in particular: adaptability, empathy, organisational awareness, self-awareness and emotional self-control.

FIGURE 1: THE HR CYCLE
For more on HR management, see Annie McKee, Management: A Focus on Leaders. Pearson, 2014

FIGURE 2: EMOTIONAL INTELLIGENCE
For more on emotional intelligence, see Annie McKee, Richard Boyatzis and Frances Johnston, Becoming a Resonant Leader. Harvard Business Press, 2008
Organisational awareness is the ability to grasp organisational climate and mood — what we call the emotional reality of an organisation. Because feelings matter at work, and because they affect our capacity to think and behave, HR leaders need to understand the emotional reality of their organisations and know how to move the mood toward excitement, appropriate challenge and optimism. Once again, when it comes to the learning function, this is key. The competent learning professional understands how to read organisational trends (and then knows how to translate these trends into powerful, positive learning programmes).

Adaptability is obviously necessary in our world today. Change is constant and often dramatic. For example, HR leaders must adapt all basic technical processes to changes such as the movement from hierarchical to matrix organisations and back again, the swing between centralised and decentralised service provision and/or from shared services to service provision in the business, and the constant evolution of technologies that affect the entire HR cycle. For learning and leadership development specialists, this competency is extremely important as we try to understand how to manage the balance among face-to-face, blended, and online learning. The rapid and somewhat trendy move to MOOCs is powerful; if you don’t truly understand how to adapt learning best practices to a variety of contexts, you could find yourself jumping on a trend rather than skillfully navigating your changing environment.

Empathy is the ability to read accurately the needs, motivations and desires of other people. This competency is at the core of the HR leader’s job, for what is more basic than understanding what our internal clients need? For the learning and development professional, this competency is doubly important for at least two reasons. First, the empathy competency enables you to understand how people will respond to your learning programmes. Will they resist? Will they get bored? Or, will they be enthusiastic co-creators of a learning experience that lasts? Anticipating individuals’ reactions to your programmes is key to the design and implementation of programmes that work.

Whatever technologies you have access to you still need to ensure that basic HR activities get done well, nothing will discredit you faster than not providing basic services to your organisation.

Self-awareness and emotional self-control are essential for success as a leader. Research indicates that understanding one’s own emotions and how they affect thoughts and behaviour is essential for working in complex organisations. Work today is stressful and all leaders must navigate constant changes, political pressures and overwork (what we call the Sacrifice Syndrome).

If you do not understand your emotional responses to stress, you are lost before you begin. On the plus side, if you know how to kindle your own optimism, find joy in daily “wins” and build relationships that feed your soul, you will find that you can shine as a leader. The interplay between self-awareness and emotional self-control is evident in these examples — one comes before the other but both are necessary for leadership success. An added and often missed benefit of mastering one’s emotions is that your feelings become the source of others’ enthusiasm, optimism, and commitment. That’s because emotions are contagious!

As a successful learning leader today you have many opportunities to shape yourself as a leader in your own right. Your organisation’s leaders need you. And they need you to be more than a partner. They need you to lead. As you chart a course for your own development, then, start with the ambition to lead.
Andrew Rutsch draws out key implications for the Chief Learning Officer (CLO) of three streams of work: the EFMD Learning Business Partner Special Interest Group, the EFMD Sharing Best Practice workshop on learning and development consulting and a five-year action research programme with Capgemini University.

In an environment that is increasingly disrupting companies, industries and even countries, many organisations are at risk. One-time industry icons such as Kodak, Nokia and Sony are now either bankrupt or stumbling. In response, firms are gearing up their efforts to address this accelerating environment of change.

On one hand, enterprises are becoming more inclusive of internal and external stakeholders in their development.

For example, through “open innovation”, firms are accessing external ideas in order to accelerate innovation (Chesbrough 2003). Similarly, the “co-creative enterprise” gives employees, clients and suppliers a bigger say, promising increased insights, revenues and profits (Ramaswamy & Gouillart 2010). And some firms have even started “crowdsourcing” their strategy, increasing its quality and building enthusiasm and alignment (Gast & Zanini 2012).

But on the other hand, firms are also increasingly building internal teams to support strategic initiatives (Fortune 2012) such as new business models (Anthony & Brown 2012) or process management (Benner & Tushman 2003). Two-thirds of the largest German companies are running internal consulting units (BBS & EBS 2009).

Even so, most efforts to enhance business development still tend to focus on the firm level (eg creating a new strategy, offering or business process) and are predominantly driven top down.
Four key factors surfaced in the course of this examination:

Make the strategic context clear
Articulate positioning
Create an embedded business model
Translate into multiple impact

Yet conceiving of strategic renewal as learning occurring across multiple organizational levels (individual, group, firm, inter-firm) and directions (top-down, bottom-up, lateral), such biased practice leads to initiatives not being properly absorbed by the firm.

In addition, such efforts are driven by corporate functions that tend to operate in silos with little integration and strategic guidance (Campbell, Kunisch & Müller-Stewens 2012).

These challenges suggest the need for better integration of activities and thus more sustainable organisational learning across levels, functions and entities.

Indeed, the reason for the huge failure rate of strategic initiatives – two out of three fail (Sirkin, Keenan & Jackson 2005) – may be firms under-investing in learning activities that support assimilating the intended changes (Lechner & Floyd 2007).

Similarly, enterprises may be over-investing in individual capabilities and under-investing in facilitating the flow of learning between levels (Bontis, Crossan & Hulland 2002) such as translating an innovative idea of a sales professional into a commercial offering.

This is where the corporate learning function (CLF), or corporate university, can capitalise on its strengths of facilitating enterprise-wide learning.

How this is done in practice – and where future potential lies for the CLO leading and shaping the CLF – has been investigated along three streams of work:

• the EFMD Learning Business Partner Special Interest Group (LBP SIG)
• the EFMD Sharing Best Practice (SBP) workshop on learning and development consulting hosted by EDF
• a five-year action research programme with Capgemini University.

Four critical success factors surfaced in the course of this examination:

Make the strategic context clear
A key finding was that many variations of CLFs exist, in terms of scope, structure, governance and so on. This was attributed to the strategic context being a critical factor in the design of the CLF.

More specifically, it means any learning initiative must be measured against market needs, business challenges and so forth.

Such a systemic view provides the grounds for why a CLF, as one part of the solution, needs to be scoped, structured and governed in a certain way, along with other key actors such as strategy, operations, communications and HR.

For example, IT services company Capgemini faces a market disrupted by new technology vendors, pure play competitors and globalising clients (at the inter-firm level).

In response, it is reinforcing its transformation around new business models, offerings, delivery and structure (firm level). At the same time, Capgemini’s management consultants, enterprise architects or outsourcing staff (group level) have a key stake in these changes, within and across communities, as well as each employee and new joiner (individual level).
Critical success factors for the CLO in a disruptive economy

These multiple needs need to be addressed by Capgemini’s “transformation architecture”, including its CLF, Capgemini University.

Articulate positioning

A second critical factor that emerged was positioning, establishing a worthwhile position of the CLF, its role and value proposition.

Management research offers an analytical lens, suggesting that organisational learning to achieve strategic renewal occurs through feed-forward (bottom up) and feedback (top down) processes across levels, functions and entities (Crossan, Maurer & White 2011).

Yet the full potential of the CLF in supporting firm development along these processes is often not leveraged.

For example, Hilse & Nicolai (2004) found that only 14% of CLFs are integrally involved in the strategic renewal process the firm. Put differently, most CLFs are used as top-down instruments to cascade a new strategy, offering and so forth and are biased to individual change and development (Altman & Iles 1998, Elkjaer 2001).

Encouragingly, LBP SIG participants such as Allianz, Capgemini and SEB or EDF have advanced their value propositions. For example:

- Allianz Group Learning sharpened its aspiration, to contribute to the alignment and development of the group’s strategy and organisational capabilities
- Capgemini University evolved its vision to be the strategic partner for continuous transformation and competitive advantage for the group
- SEB’s corporate learning team reorganised to become a driver for leadership and organisational development in the transformation of the firm
- EDF Corporate University for Management has advanced its ambition to be a key partner for strategic and organisational development within the group

Create an embedded business model

When the target position reflects the value proposition of the CLF, the business model defines how it creates that value for the company.

This raises the question of what activities the CLF needs to engage in, how to structure and sequence these and who to involve (Zott & Amit 2010).

Hence, conceiving of a “transformation architecture” of the firm, the CLF’s activities need to be linked and sequenced with what is done by other key actors in the firm in facilitating bottom-up and top-down learning across levels, functions and entities.

One growing practice discussed in the LBP SIG and SBP workshop is performance consulting (Robinson & Robinson 2008). It reflects the move of CLFs to prioritise the end over the means.

For example, EDF’s distribution business in France was challenged by a changing regulatory environment. As the renewal of its concession contract of €11 billion was at stake, it had to redefine its business model. In response, EDF Corporate University worked with the CEO, business, HR,
finance and faculty from the Toulouse School of Economics, to diagnose, design and roll out an organisational learning programme.

At Capgemini, the consulting business was confronted with shifting market needs around new technologies such as big data, mobile and cloud. Its leadership responded by leveraging Capgemini University to co-create and implement its new Digital Transformation positioning in collaboration with the Massachusetts Institute of Technology (MIT), by engaging, mobilising and developing its consultants.

These two examples, as well as insurance firm Allianz’ executive campus or banking group SEB’s change programmes, reflect the importance of the CLF being an integral part of how the firm learns and develops.

Connecting, challenging and supporting key stakeholders across levels, functions and entities in tackling business challenges may become its most important activity.

**Translate into multiple impact**

The last factor that surfaced was business impact.

Traditionally, business impact through the CLF is ill defined and hard to measure. Closer collaboration with other key actors in supporting and translating bottom-up ideas into changes at the group and firm level is expected to increase the CLF’s business impact and visibility.

Working with key stakeholders across levels, functions and entities from the beginning will likely enhance diagnosis, implementation and results (Gast & Zanini 2012).

At EDF, expectations of the CEO and other executives have been exceeded while the programme is still being implemented.

At Capgemini, its consulting business has been externally ranked as the first comprehensive provider of digital strategy services.

Other LBP SIG members provided examples such as facilitating the decision to enter a market (Allianz), or preparing a business unit for growth (SEB).

The LBP SIG, SBP workshop and action research with Capgemini University (Rutsch & Ben-Hur 2011) provide much evidence that the CLF is a key platform for reinforcing or even accelerating the continuous transformation of the firm.

Fundamentally, this discussion points to business leaders’ assumptions about how people and organisations learn, underlining how much they are generally rooted in two paradigms.

Most current workplace learning (and school) practice is based on an objectivist belief system. It assumes that there is an objective reality that can be deconstructed, simplified and mapped onto individuals (Jonassen 1991).

This has led to traditional top-down approaches to management and classroom-heavy training disconnected from the experienced real world. This worked quite well in previous, more stable, times.

More recent and innovative approaches to learning and transformation are based on a constructivist conception, which views reality as constructed by individuals who grow into and expand social practices (Wortham 2003).

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More recent and innovative approaches to learning and transformation are based on a constructivist conception, which views reality as constructed by individuals who grow into and expand social practices (Wortham 2003).

The examples discussed above provide a sense of what might be possible.

In an increasingly social, collaborative and transparent environment, the move to a more strategic approach to enterprise learning and transformation is inevitable.

Such an approach facilitates integration of traditionally separated activities around firm development and learning across all levels, functions and entities – enabled by the CLF yet part of a larger collaboration with the other key actors in business development.

Hence, as CEO how would you leverage your CLF? Compare this to how your corporate learning budget is currently invested.

**ABOUT THE AUTHOR**

Andrew Rutsch is a consultant to Capgemini University and student in the PennCLO Executive Doctoral Program. He is Co-Founder and Facilitator of the EFMD Learning Business Partner Special Interest Group and author of several publications on enterprise learning and transformation.
Learning Business Partnering and the CLIP framework

Throughout the journey of the past few years with all the exchanges and reflections regarding learning business partnering, a few themes have crystallised that may contribute to the evolution of a number of standards and criteria used in EFMD’s Corporate Learning Improvement Process (CLIP). In the article below, they are clustered into four main lines of thought.

Positioning of the corporate learning function: what role is being claimed?

Corporate Learning functions come in different sizes and vary in their scope and this has certainly had an impact on the different roles these organisations have been taking on in recent years. One tendency is that the more corporate learning organisations go beyond the delivery of core leadership development programmes, the less they can maintain a purely expert role (if they ever did); they find themselves moving into an internal service role, supporting a wide variety of stakeholders in the business.

In this respect, the reactivity and problem-solving capacity of the learning organisation as assessed in the CLIP criteria is crucial to a wider range of internal ‘clients’ and typically lead to a broad portfolio of programmes and initiatives. The reactivity challenge thus becomes more than just the cycle time of designing or adapting solutions: it involves responding to a flow of parallel streams of demands (and related programmes). And the core added value becomes ‘investing in people’ rather than ‘developing leaders’.

Two risks tend to come along with this extended role and it might be interesting to include them in the CLIP assessment:

- How is the learning organisation keeping its eyes on the business and positioning itself as a support to business development and even to business innovation? Is it able to do more than focus on its own role as a learning services factory, juggling all the demands and operational challenges and maybe limiting itself to an efficiency drive with respect to the learning spend? Is the learning organisation capable of keeping an investment perspective, and be perceived as such?
- Is the organisation capable of supporting an organisational development agenda at the company level or is its perspective limited to the level of the individuals participating in its programmes and initiatives? When inundated with a large volume of demands with many programmes to deploy, corporate learning organisations tend to structure themselves around repeatable and stable processes. The necessary time and focus for being a change agent for the company get, more often than not, marginalised.
Business impact: how to assure relevance to the business?

Probably the major challenge for any internal corporate service, be it learning, HR at large, IT or other, is to assure that its initiatives are contributing to the business. And for larger learning organisations it is typical to have a full scorecard of activity indicators (number of hours per person, learning spend per person, and the like) that clearly help to visualise the volume of formal learning. Though this reporting capability is a necessary condition to enter the discussion on relevance, it is definitely not a sufficient one. In some rare cases, learning organisations are even capable of splitting this volume by major strategic priority, transformational initiative or business challenge, which indicates how well the investment is channelled to the key priorities of the company. However, these scorecards and reports too often lead to efficiency and cost reduction discussions rather than contributing to a reflection on learning as an investment (and on the prioritisation of investments).

Besides assessing this risk of focusing on efficiency over effectiveness, a CLIP review could also more actively probe for:

- Which measures and indicators are used in the (internal) reports and communications by the learning organisation to indicate its effectiveness in tackling the key business challenges in a given year?
- How is the intended impact of a learning initiative (or a set of initiatives) defined and documented at the analysis and design stage? By whom? And how have these people been prepared for this role?
- Does the impact model or map include the behavioural impact on the individuals who fall within the scope of the discussion? But also, is the learning organisation and its learning professionals capable of taking a systems perspective with regard to the impact of learning: on the individual, the teams, departments, business processes, product and customer portfolio, business results and, ultimately, financial performance of the company?
Learning Business Partnering and the CLIP framework

Business model of the learning organisation: how is it creating and delivering value?
One of the items getting more and more attention in CLIP reviews is what could be called the learning and development eco-system (i.e. L&D beyond the corporate learning organisation). How are the key activities in creating and delivering learning added value sourced, organised and governed even if this is achieved in a partnering mode with other internal and external organisations? Below are a few considerations from the perspective of business partnering:

First of all, what does the enterprise learning architecture look like (i.e. what are the means available for constructing learning solutions)? What is the roadmap and who are the main actors and stakeholders involved in the definition and deployment of learning solutions? These considerations become even more relevant as informal and workplace learning activities are included as learning solutions. In this respect the learning architecture is probably best considered as a sub-set of business processes rather than focusing too much on the systems supporting these processes.

Where is the Learning Business Partnering capability housed? Who are the professionals that deal with the intake of business learning challenges in order to analyse and document the request? Three models have been observed: 1) the learning professionals can be part of the learning organisation, 2) the role can be performed within HR or 3) it can be performed by a supplier (involved in the analysis stage). In addition to the assessment of the way these three work together, even when not being the leaders in the learning business partnering process, it is worthwhile to test the basic assumptions on which this co-operation is built:
• when relying on suppliers, how was this sub-contracting decision taken? (case-by-case, generic practice, etc.) And, who took that decision and was the impact on the learning value chain, positioning and perceived added value of the learning organisation part of the considerations?
• when relying on HR, how well do HR professionals integrate this role and how is the interlinking with the learning organisation secured? i.e. what does the HR service model look like?
• and in the case where the Learning Business Partnering role is performed by professionals in the learning organisation: how is this role defined? And how do these professionals interlink with the suppliers and HR during the initial process of a learning intervention? Is there a definition/description of this process?

Learning consultants or learning business partners, wherever they are located or whoever is performing the role, are a specific breed of professionals much closer to consultants than to programme manager profiles.
• Their (individual) problem-solving capacities and more specifically problem-analysis and solution design capability are key competencies in adding value. And this already starting at the initial intake of the development challenge.
• The CLIP criteria mention “exposure to business” and “target market understanding” of the learning organisation’s resources. With respect to learning business partners these qualities are to be considered crucial for each and every individual professional in this role. This is the case because their credibility and legitimacy are the foundations of the credibility and legitimacy of the learning organisation itself.
• The interfacing of these learning business partners with the programme design staff as well as their integration in a structured internal client interfacing process (possibly supported by a CRM or similar system) should also be subject to analysis in a CLIP review. This interfacing guarantees the responsiveness and predictability of the entire learning organisation rather than being solely dependent on individuals.
One key challenge a growing number of corporate learning organisations are struggling with is the global integration of the learning activities in their respective companies. Interestingly, some companies started down this path over a decade ago while more and more are following the same route. A key observation in this respect is probably that this functional integration must fit a broader agenda of corporate integration. Indeed, the learning function can only be as integrated as the rest of the company is. It might be a well-considered forerunner but it cannot be completely out of sync with the rest of the organisation. In any case, the choices with respect to task split and task specialisation, as well as regarding the functional co-ordination and integration mechanisms could become part of the CLIP assessment criteria. Even if it must be remembered that every case is specific and generalisations based on practices in other companies should be avoided.

The above observations on the business model also give some indications on potential further specification of the ‘governance’ dimension in a CLIP review:

• do the learning organisation’s governance bodies review and shape the entire learning eco-system?
  – is there an explicit agenda with respect to global integration? And what is the role of the corporate department in this functional and hierarchical integration?
  – has the enterprise learning architecture been discussed and is there a roadmap moving forward?
• has the learning business partnering capability been reviewed and what decisions have been taken on where to locate it?
  – are the choices generic or rather case-by-case? And in the latter case, is there a set of guiding principles for taking these decisions?
  – is there a structured and possibly documented client interfacing process?

Though the context in which a learning organisation operates does not completely determine the learning organisation’s key parameters, the experience of the past few years show that they clearly limit the options.

The importance of strategic context: the choices on positioning and business model are to be considered situational

Though the context in which a learning organisation operates does not completely determine the learning organisation’s key parameters, the experience of the past few years shows that they clearly limit the options. Put the other way round: best practices in one company should only be transferred after careful consideration of the specificities of the originating and the target organisations. Some of the factors that can help decide on similarity or difference of strategic context are:

• industry/sector in which the company is doing business: this has an impact on the capital intensiveness, on compensation cost, on dependency upon knowledge and expertise, and on typical employee turnover…
• level of integration: holding structure or business unit structure, global organisation or multi-domestic, single brand or multi-brand, sophistication of administrative and financial processes and systems…
• maturity in learning & development: learning seen as an expense or an investment…

To conclude, these inputs may serve as a basis for ongoing consideration in the CLIP steering committee but they are not intended to pre-empt further debate. On the contrary, all reactions, reflections and feedback are welcome. I look forward to receiving them!
This Special Interest Group (SIG), inspired by EFMD’s Excellence in Practice Award, explores current practices in the initial partnering or “contracting” stage of a learning and development (L&D) intervention.

- How consistent are providers and clients in analysing, describing and documenting the business challenge that lies at the basis of the development request?
- How is ownership of the business challenge and involvement of stakeholders guaranteed at the client end?
- Which expertise do providers typically bring to the table during this initial stage?
- How complete and impact oriented are the initial agreements (committed deliverables, operational parameters, intended impact)?

In a mixed group combining business schools and alternative providers combined with corporate representatives, current partnering practices between clients and (multiple) providers will be shared and new ways forward explored.

**THE PROCESS**

*In a mixed group combining business schools and alternative providers, current partnering practices between clients and (multiple) providers will be shared and new ways forward explored.*

**The EFMD LBP SIG**

This EFMD L&D Co-design (LCD) SIG initiative has been launched in response to the identified needs noted above and as part of EFMD’s drive for Excellence in Corporate Learning.

This SIG will bring together 15 organisations to work on key issues in deploying partnerships and develop solutions that participants can implement in their own contexts. The intention is to create an equal representation of business schools, alternative providers and corporate L&D departments.

A practical approach and methodology will be used. Participating organisations will agree a work plan at the start of the SIG. The output will be a set of tangible deliverables including defined strategies and approaches, roadmaps, tools, case studies and input from expert research and advice.
The group will have access to extensive research from EFMD and leading academics, input from experts in the field and a range of other resources to support building roadmaps and practical implementation plans:

- outcomes will be developed based on the contributions of all group members and leading research
- subject experts from practice and academia in the learning, HR and strategy field will be involved as required
- all participating companies will receive constructive input through the facilitated process, interactions and outcomes benefiting their own continuous improvement and justifying their investment
- outcomes will be captured in a publication for EFMD to promote and to enhance the research positioning of EFMD.
The outcomes
We have planned for this SIG collaboration to deliver useful and tangible outputs for each of the participants to take and apply within their own companies. At a minimum, these are expected to include:

• Best practice sharing and exploration of the different options towards partnering in co-design in the context of each participating organisation
  – How to make this paradigm shift work: linked to the business from the start (getting KPI’s and link to business strategy defined) and integrated in the business processes throughout.

• Exchange of experiences and roadmaps in rolling out successful partnering initiatives – allowing for peer consulting and an outside-in view on the internal change process
  – What are the successful and recurring models, how do schools, consultants, EDC’s and corporate universities adapt to this changing set-up, the blurring of roles, complex analysis and design processes, multi-partnerships, discussions on pricing, intellectual property and the like.

• Articulating the roles, tasks and capabilities required for L&D professionals, both at supplier and client side, to be successful in partnering ventures
  – Clear ownership of the business challenge by the business; L&D professionals with excellent business acumen, project management skills, consultancy capabilities; alternating leadership etc.

GET INVOLVED

Representatives
Each participating company commits to delegate a learning leader with a close link to the strategic agenda of the firm as a SIG member dedicated to contributing actively to the development of the above outcomes.

The starting point
Two organisations have already committed to this SIG and are preparing details of a final work plan and specific challenges to be addressed within the SIG.

• Mannaz
• Open University (UK)

These will be adapted as other SIG members join, so early entry is recommended.

Fee
The participation fee for EFMD members is €2,500. The participation fee for non-EFMD members is €3,000.

How to join
Please contact:
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THE OUTPUT

The output will be a set of tangible deliverables including defined strategies and approaches, roadmaps, tools, case studies and input from expert research and advice