Retooling Learning & Development

ROLES & SKILLS

10.23.17
MASIE CONFERENCE
As we’ve shifted to become a performance-driven L&D organization, we’ve realized we need more than just alignment with the business and HR on strategic initiatives: *we need new skills*!

Traditional L&D skills that got us here are not sufficient for the future, so what new roles and skills are required? As we’ve been retooling L&D for Macy’s, we’ve learned many lessons that we’ll share to give you a jump-start as you think about your L&D organization of the future!

**JOIN US TO LEARN:**

› **Where to start:** How to begin shifting L&D to become an organization that enables learning (vs. delivers training)

› The **non-traditional L&D roles & skills** needed for the future

› How best to **leverage technology to enable learning**: our broadened view
Retooling Learning & Development

ROLES & SKILLS

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Get Focused

Align to Your Company’s Strategic Priorities
External & Internal Trends

Step Back & Evaluate What’s Happening Around You

Modern Worker
- Untethered
- Info On-Demand
- Value Ability to Learn
- Connectivity

Performance Focused
- Performance is End Goal
- Continuous Learning
- L&D Organization Evolving
- Mobile Performance Solutions

Cloud-based Technologies
- Learning Experience Platforms
- Seamless Compatibility, Ease of Scalability
- Learning Records Store

Predictive Analytics
- Operational & Advanced Reporting
- Advanced Analytics
- Move to Predictive Analytics

Step Back & Evaluate What’s Happening Around You
Untethered

Today employees find themselves working from several locations and structuring work in nontraditional ways to accommodate their lifestyles.

30% of fulltime employees do most of their work from somewhere else.

Info On-Demand

Employees are accessing information differently than just a few years ago. Most information they deal with on a daily basis is unstructured and constantly changing.

70% turn to search engines for knowledge in the moment.

Connectivity

Always on connectivity is expected to dramatically increase as virtual teams and remote managers continue to rise.

By 2020 the mobile workforce is expected to comprise roughly 75% of US workforce.

Value Ability to Learn

There’s been a value shift from the importance of knowledge to the ability to learn. Information is outdated very quickly. More valuable in today’s work environment is the ability to learn new things and apply those learnings to new situations and the fast paced work environment.

‘Knowledge is a commodity, to be the smartest person in the room all you need is a smartphone. What is far more valuable than knowledge is the ability to learn new things and apply those learnings to new scenarios and environments. This is what the employee of the future needs to focus on, “learning to learn.”’
Performance is End Goal

Learning in the workplace is a means to an end; it’s not the end goal. It’s not about learning for its own sake - the goal is performance improvement.

Focus on defining performance problems, performance outcomes, and measuring success against performance metrics rather than simply learning objectives and outcomes.

Continuous Learning

All the research shows that ongoing continuous learning & coaching improves engagement, employees ability to be aligned, agile, focused and drive performance more consistently. This will be a critical capability across organizations who will succeed in the future.

Approx. 90% of learning happens while working or working in teams, not in the classroom or e-learning.

L&D Organization Evolving

The future focus of L&D organizations on performance is resulting in performance gap analysis that are not resolved with learning solutions. L&D organizations will take on broader roles in companies through performance consulting without the end goal being training.

Processes in organizations are fluid and learning needs are diverse. L&D organizations value is not in delivering training but in their ability to provide a framework that supports a culture of growth & development.

Mobile Performance Solutions

Smart phones and tablets are found everywhere and more people want to be able to use them to access content “on the go” in a variety of situations – not just at work, but as they travel – and during other periods of “dead time.” And for the mobile workforce this is now a necessity.

Many organizations are adopting a “mobile first” strategy – one that assumes smartphones and tablets are employee’s primary tools for getting work done, and this means mobile devices are used to support learning and performance in new ways.
Learning Experience Platforms

Learning Experience Platforms are emerging and will have a direct impact on how we engage employee’s through learning that includes curated content, video formats, and other forms of content internal and external to the organization.

Today’s Learning Management Platforms, such as Learn, are transactional systems meant to administer, manage, and report on training completion. This is a compliance-driven platform and is too rigid in today’s business environment.

Learning isn’t something to be “managed”, it should be enabled.

Seamless Compatibility, Ease of Scalability

Cloud based learning technologies will be game changing- anywhere, anytime access to learning applications, instant scalability to meet growing learner populations, seamless compatibility with social and collaborative tools.

The delivery model will shift from organizations buys, installs, accesses, controls and maintains all learning applications and courseware in house to the cloud hosting all or part of the organization’s learning applications and courseware. Applications that have traditionally been created and managed inside our firewall have been laborious to design and support. The cloud changes all of that!

Learning Records Store

An open source, massively scalable database designed specifically for storing learning activity data that can come from multiple learning platforms. LRS is used to receive, store, and return data records where needed.
- Offers a way to study the relationship between experiences and outcomes, whether that is customer satisfaction, engagement, better safety records, more sales or increased productivity

External & Internal Trends

Cloud Based Learning Technologies
L&D organizations new measurement framework provides companies with the roadmap to move from Operational Reporting to Predictive Analysis. Use of multiple cloud-based learning technologies will feed data into a massive storage (Learning Records Store). The ability to collect the data in this open source environment and integrate with other talent management data gives organizations the ability to move measurement from reporting to analytics, as detailed to the right.

Operational & Advanced Reporting

Operational & Advanced Reporting is primarily standardized and will account for greater than 80% of the measurement framework.

Advanced Analytics

Advanced Analytics will be used to solve specific business performance opportunities, 10%.

Move to Predictive Analytics

Ultimately, learning organizations will move to Predictive Analytics which will be used to identify potential development opportunities.

Though Advanced Analytics and Predictive only account 14% of the framework, the impact far exceeds the gain from Reporting.
<table>
<thead>
<tr>
<th>Focus on Learning</th>
<th>Focus on Performance</th>
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</thead>
<tbody>
<tr>
<td>Focus on the participant or ‘learner’ in formal learning situations</td>
<td>Focus on the employees, work (environment), and the organization- a 360 of the employee</td>
</tr>
<tr>
<td>Develops and delivers formal learning solutions- learning goals</td>
<td>Develops and delivers solutions to improve organizational performance and learn from this – performance goals</td>
</tr>
<tr>
<td>Analyses the learning need</td>
<td>Analyzes organizational and performance needs</td>
</tr>
<tr>
<td>Learning is the result of skills deficit</td>
<td>Learning tackles performance problems within the organization</td>
</tr>
<tr>
<td>Learning is separated from work</td>
<td>Learning &amp; work are integrated</td>
</tr>
<tr>
<td>Focus on learning solutions</td>
<td>Focus on creating effective connections between working and learning, Learning by working together and performance support solutions</td>
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<tr>
<td>Learning is an event in itself</td>
<td>Learning is constant process and part of overall performance</td>
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Provide Training
Provide Contemporary Learning Experiences

- Provide cadence to offering core programs, virtually and live in support of business strategy
- Flexible, informal micro content for PC and mobile, include Learning Performance Campaigns
- Curate and Coordinate Learning Opportunities – curate internal/external content, coordinate learning opportunities around talent needs & business strategy

Promote Everyday Learning

- Help Managers develop individual potential and talent, as well as build their own coaching and social leadership skills
- Encourage learning from work-help individuals to reflect on everyday experiences, record and share
- Support social learning & collaboration – help teams share knowledge & experiences, co-create & collaborate, and support one another as part of daily work

Source: Jane Hart Learning in the Modern Workplace
Shifting L&D’s Role

Retool Your Team With New Skills For A New Role

Visual Designer

Executive Experience Specialist

Curation & Research Specialist

Multimedia Programmer

User Experience Interface (UXI) Designer

Learning Performance Designer
The Visual Designer is responsible for translating learning objectives to a visual design strategy that engage diverse audiences, enhance personal performance and drive business results. They will lead the creative dialogue providing a fresh visual perspective and identify innovative visual design solutions. Collaborating across multiple teams and stakeholders, they will build consensus on a holistic visual design strategy. During the production phase, their visual design strategy will provide creative direction as they guide and critique the visual execution process to completion.

Creative thinking: Ability to craft a vision utilizing an active imagination to present innovative solutions and fresh thinking. Leads the creative process to solve visual challenges, generate ideas, and build best practices.
- Insatiably curious asking the big questions to gain a deeper understanding of learning objectives to connect with the audience and understand their motivations, drivers, and performance gaps in order to propose engaging visual solutions.
- Conceptualizes and visualizes multiple design solutions by connecting abstract ideas to see possibilities where others don’t. Takes risks, experiments and explores (makes mistakes) to discover new ideas.
- Continuously replenishes creative inspiration observing everything around them (people, events, social media, experiences, etc.). Identifies trends in creative expression and adapts and applies ideas that are meaningful to the learner and the performance objective.

Visual Design: Shapes the creative direction of the work by defining holistic visual strategies across platforms (the look, feel, and user experience) to meet business needs.
- Synthesizes Ideas into a comprehensive creative strategy (The Brief) that guides the overall look, feel, and tone of the visual design which will gain alignment, guide decision-making, and avoid personal preferences throughout the design process.
- Critiques & provide direction, guiding concepts through initial ideas through development and implementation. Determines what goes in and out of the visual solution and how visual elements will work together.
- Leverages design principles to creatively combine visual elements including layout, color palette, font choices, hierarchy and imagery.

Collaboration: Partners with Graphic Designer, UX/UI Designer, and Learning Performance team to explore solutions and align on a visual design strategy. Keeps the project team informed, clearly communicates ideas, gains consensus, and integrates feedback that strengthens the visual design.
- Builds consensus, listening to feedback, discussing alternatives, and gaining alignment from key stakeholders, while challenging and encouraging teams to think beyond what is today and explore what could be.
- Actively listens and gives full attention to what other people are saying, takes time to understand the points being made, and asks questions as appropriate. Understands both verbal and non-verbal cues and incorporates insights into responses for a positive meaningful dialogue.
- Strong Communication: Effectively explains ideas and rationale behind creative work, presents ideas, and writes strong proposals.

Critical thinking: Translates project needs into visual solutions by evaluating the problem, filtering information, and drawing conclusions.
- Uses logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems
- Judgment and Decision Making: Considers the relative costs and benefits of potential actions to choose the most appropriate one.
- Research and planning: Utilizes research and inquiry to understand project goals in order to propose visual solutions. Develops a plan for approaching each project with clear steps from beginning to end.
Retool Your Team With New Skills For A New Role

The Curation and Research Specialist is responsible for sourcing the best and most relevant content for continuous learning to provide our teams a competitive advantage. Looking for fresh insights they will continually filter, organize and share high value content supporting growth and development of the learner. Collaborating across multiple teams and stakeholders, they will execute the curation strategy for targeted audiences to improve overall performance.

Organize to Optimize: Ability to filter, synthesize and distill multiple data points to increase access and speed to the most pertinent information for continuous learning.

- Creates order from chaos by organizing and arranging content into bite size learning nuggets.
- Prioritizes high impact content to optimize the audience’s learning experience.
- Leverages technology to see more content and then utilizes human filtering to add context. Believes that curation can be powered by machines but is made effective by humans.

Focused Curiosity: Constantly explores and researches the digital landscape with a purpose to discover fresh, engaging, new content to support continuous learning

- Utilizes digital ingenuity to source the best, most pertinent, up-to-date information across cyberspace for the target audience.
- Asks questions relentlessly to dig deeper beneath the surface in the pursuit of increasing the performance of our target audience.
- Avoids the echo chamber and embraces diversity in their knowledge discovery. Keeps an open mind and is receptive to learn, unlearn, and re-learn.

Audience Empathy: Ability to source relevant content that resonates with the specific self-development needs of the target audience.

- Understands learning gaps that exist in the self-development of the target audience.
- Actively listens to become a trusted guide to deliver relevant, engaging content.
- Strives to read the audience to validate their level of engagement through measurement such as clicks, comments, likes and upvotes.

Critical thinking: Translates project needs into curating solutions by evaluating the problem, filtering information, and drawing conclusions. Align with the business to deliver content to improve organizational performance.

- Uses logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Leverages good judgment and decision making considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Utilizes research and planning to understand project goals in order to propose curating solutions. Develops a plan for approaching each project with clear steps from beginning to end.
Shifting L&D’s Role

Retool Your Team With New Skills For A New Role

Works directly with L&D Multi-Media Producers and UX/UI Designer to produce native learning apps and responsive web-based learning solutions across multiple delivery channels to meet the development needs. Uses HTML, HTML5, CSS, JavaScript, JQuery and other programming languages to implement complex interactive learning experiences. Implements custom API statements to report usage to internal LRS. Customizes content management system pages to stage learning content. Develops reusable code library to increase efficiencies in execution, stays current on programming languages, and proactively researches new technologies and programming solutions to meet the needs of learning audiences.

Specific Qualifications (education, certifications, years of experience, interpersonal skills, job specific requirements, and technical skills):

- Proven programming capabilities
- Excellent verbal, written and communication skills
- Proficiency in HTML, HTML5 (bootstrap) CSS, CSS3 and extensions, and JavaScript for rapid prototyping
- Proficient in front-end frameworks and web application frameworks
- Create custom API statements
- Strong problem solving skills
- Agile to work in a changing business environment
- Project management skills; ability to manage multiple priorities
- BA/BS degree in Computer Programming, Computer Science, Graphic Design or related field
- 1-3 years related experience within a corporate environment

Overview/Essential responsibilities of the job:

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Retool Your Team With New Skills For A New Role

Shifting L&D’s Role

User Experience Interface (UXI) Designer

Works collaboratively across teams to obtain and position information in a way that will entice users to seek and access learning that is engaging and interactive. The UXID uses their skills to translate requirements into interaction flows that are creative, intuitive and provide the best functional user experiences.

Specific Qualifications (education, certifications, years of experience, interpersonal skills, job specific requirements, and technical skills):

- Utilize tools and other supporting software.
- Execute all UXI design stages from concept to final hand-off.
- Solicit feedback from design leadership and design team members to insure quality.
- Take smart risks and champion new ideas that translate into increased user engagement.
- Maintains an aesthetic over all style and approach to achieve the desired look.
- Adapts to new situations, improvises and shifts strategies to meet different types of challenges.
- Design and deliver optimized user experiences for a wide range of devices, interfaces and audiences.
- Make strategic design and user-experience decisions related to core, and new, functions and features.
- Clearly communicate design decisions, process and rational for arriving at those decisions.
- Utilize research and user data to inform design decisions.

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Shifting L&D’s Role

Retool Your Team With New Skills For A New Role

This role must leverage a deep understanding of both the **business** and factors that drive **performance** (knowledge, skill, behaviors, motivators, cultural norms, and environments) in the design of meaningful learning solutions. Also essential is the ability to understand unique needs of different stakeholders and partners – and reflect that understanding in clear, focused communication.

Create learning solutions that align with organizational initiatives to drive growth through enhanced performance

- Gain performance insights through internal and external **research**
- Partner with key stakeholders and business partners to **consult** on business and performance needs.
- **Collaborate** with internal & external design and development partners to create learning solutions (tools, resources, experiences) that meet the needs of both the business and the learner

Specific Responsibilities:

- Be accountable for the design of stores learning and performance solutions that are learner-centric – that measurably meet business and performance goals
- **Apply** steep knowledge of our business, structure, culture, technologies, and process, in the analysis of opportunities and design of performance and learning solutions
- Conduct thorough internal and external research to identify factors impacting current and future state performance. Once a complete picture of performance has been created, determine if new skills are needed to achieve desired results
- Identify the unique needs and objectives of stakeholders and key partners, and reflect that understanding in clear, focused communication.
- **Manage** design timelines and review cycles to drive rapid prototyping and support a test & learn environment
- **Set** individual priorities in context with team priorities to meet goals in the face of multiple demands
- Engage with and work through L&D teams throughout the entire design process.
- **Determine** means of measurement to ensure effectiveness of performance solutions
Shifting L&D’s Role

Retool Your Team With New Skills For A New Role

This role supports managers to enhance the overall employee experience and increase the engagement and retention of talent

Support the shift to a culture of development:

• For key initiatives, engage managers and provide the hands-on support needed
• Leverage data and business insights to troubleshoot and provide consultation to improve manager performance. Provide “white glove” treatment or targeted encouragement to the managers that are not reinforcing the right behaviors or driving to the desired experience
• Assist in the transformation of mid-level managers to leaders in the development of their teams and influencers of the employee experience.

Specific Responsibilities:

• Influence and provide best practice solutions to managers in order to deliver against functional plans and support initiatives aligned to the strategy
• Work closely with managers to ensure they understand how to use the resources in the development of their team
• Develop skills, knowledge and confidence to encourage and affect the necessary change to deliver the desired business outcomes
• Analyze metrics to monitor and proactively manage employee experience related key performance indicators, and assist in defining strategies for improvement and management
Tips For Retooling Your Organization

Be clear in your mind what L&D will stop doing in the future

Work with other areas in your company to determine who does similar work or who should oversee the people in your organization doing work that doesn’t belong in your future organization. If you are like Macys, over the years L&D in our business units took on various roles in support of getting work done. Policy writers, system user guides, technical system owner, and any communication that someone said was “training”. You cannot be everything to everyone and be impactful.

Focus on redesigning a portion of your organization initially

Looking at the total can be daunting! Start where you’ll get the greatest return to drive the business or company strategy. For Macy’s - Since our role in the organization is to drive performance solutions (not develop training) we needed the ability/skill to diagnose performance  opportunities without a training headset.
Tips For Retooling Your Organization

Draw upon the strengths of individuals & hire for the new skills needed

Learning performance designers work in “PODs”, each with different skill strengths to define performance needs, ranging from 2-4. All have business backgrounds.

Identify the skills deficiency in that specific area of your organization

Can the skills be trained or do you need to hire for the skills needed? An individual wanting to do a new job doesn’t mean they have the capability – really hone in on people’s strengths
Retooling L&D is an iterative process (test & learn)

Remember it’s a journey. We’re in a continuous state of test and learn within our organization. As the leader you need to be very clear in your own mind and intentional with everything you test whether processes, tools, or people capabilities. You need to observe, ask questions, and listen. Lots of stops and redirects. Be thoughtful upfront to build in those points where you need to assess and make a decision.
As a leader you have to immerse yourself in the process

You have the vision, and it will take a while for others on your team to get it. Be consistent and it’s important your management team gets it first. Once they see it in action they will begin to see the vision. Reward those for bringing the vision to life. At Macys I led the first POD on a performance initiative so I could see how they interacted with each other, challenged them to think about performance differently without training. To date the management team and I are involved in the initial conversation with the business to assess high level performance opportunities and whether L&D should even engage with them. Many of the things we consult with the business on do not result in learning being designed.