Thought Leader Interviews

Training Insights – AT&T & Wells Fargo

By Jason Silberman
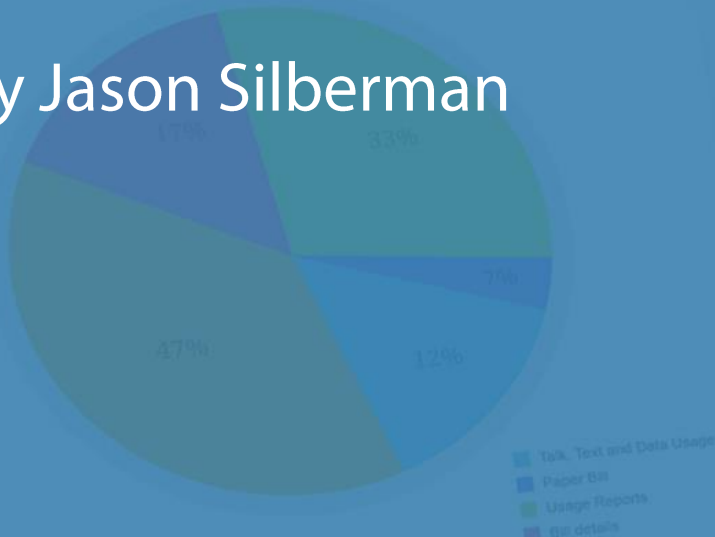
Introduction

From time to time here at *Training Station*, we are lucky enough to be able to interview key thought leaders in the world of Learning and Development. It's really enlightening to hear their thoughts on a wide variety of issues related to workplace learning, and – judging from the feedback we have heard – is appreciated by our readers as well.

Below please find interviews we did with leading L&D managers from AT&T and Wells Fargo.

Amy Rouse is Director, Learning Architecture and Design Solutions at AT&T Learning Services. In her role, she is responsible for standardizing the learning design processes (eLearning and instructor led) for the entire enterprise. Her responsibilities also include partnering with clients and IT on the development and implementation of the enterprise-wide Learning Architecture which includes the identification and establishment of standard approaches, tools, technologies, processes and methods for instructional designers, instructors and performance consultants. She has over 20 years of experience in the field of adult learning, including design, development and delivery of both classroom-based and electronically delivered instruction.

In the interview below, Amy shares her thoughts on a wide range of L&D issues, including gamification, MOOCs, learning on demand, performance support, measurement and evaluation, mobile learning and more.

Interview with Amy Rouse, AT&T

Training Station: Why don't we begin by just giving a bit about your background in the learning industry?

Amy Rouse: My career in training started in the United States Air Force, which in the early 80's had converted to electronic training records and offering a lot of training via video and slides (the old fashioned "online training"!). The really exciting part of my career began in the late 90's when my company (acquired by what is now AT&T) moved into Computer-based Training (CBT), then rapidly into Web-based Training (WBT). It was then that I stepped into the Learning Architect role and it's been a fast and exciting ride ever since!

TS: What, in your opinion, are some of the most important qualities that it takes to be a great trainer? And beyond training, to be a great team leader getting the most out of your team?

AR: Today, great trainers need to be flexible and creative with design and delivery methods, open to new ideas and technologies, and actively engaged in expanding and enhancing their skills and knowledge on a regular basis.

I think to lead a team of professionals well you need to ensure you have the right people on the team, provide a clear line of sight to both short- and long-term goals, give people the tools and latitude they need to showcase their talents, provide plenty of opportunity for collaboration, and have as much fun as possible.

TS: As someone deeply involved in learning technology, what are some new and developing technological tools that you're excited about these days?

AR: We're involved in some very exciting things at AT&T including our second generation of immersive learning (high-end simulation and gaming), designing and delivering MOOCs as employee training, and implementing Experience (TinCan) API. We're in our second year of

delivering learning via mobile devices and also interactive virtual learning (IVL) broadcast studios, and we're starting to set standards for augmented reality, QR codes, and competitive quizzing. The ability to blend any and all of these things (and more) is extremely exciting for anyone whose objective is to provide engaging, effective learning to such a large and diverse employee population as we have within AT&T.

TS: From my experience speaking to people involved in employee training, there is a gap period between the end of initial training sessions and the time when the worker is actually able to work independently and proficiently at a high level. What are some ways to best connect learning to performance? How do you think learning can and should continue after an initial training course?

AR: Each of our business segments handles this transition a little differently, but we know that most learning takes place outside a formal learning event. One way that my organization is planning to help connect the dots here is researching and prototyping a holistic informal/social learning platform and strategy that would enable each business unit to offer on-demand resources to employees at any stage of their professional development, as well as a means for employees to connect with each other and with on-demand resources.

TS: A lot of focus among learning officers these days is on performance improvement tools. Specifically, in the moment of actual work, how we can best aid the worker in performing the task in the most successful way possible. What do you feel is the proper balance between training and performance improvement tools? Is the focus in the right place?

AR: Again, learning organizations and leaders need to recognize that most learning takes place outside the formal learning events we are creating. And yet we place nearly all of our effort into these formal experiences. This is backwards. Performance resources—both skill- and knowledge-based—can take the form of traditional job aids, context sensitive system help, forums, tutorials, and many more. Industry-wide we're seeing a major shift from a narrow focus on formal learning events to curating meaningful, just-in-time learning resources available to learners how and when they need it.

TS: In an age of continuous employee learning and development, how can and should managers measure competency and performance levels? Should analysis and expectations of competency levels evolve to reflect a more long-term approach?

AR: This is a new challenge with emerging solutions. The ADL's Experience API and Mozilla's Open Badges can help us with this. Not only can we now capture non-formal learning experiences we can validate the level of competency for those experiences. These technologies are new and evolving but I think we'll quickly see some standards emerge as well as a greater emphasis on the competency validation.

TS: Informal Learning – Do you think, that online technology and learning will advocate for online collaboration, or for individual research and individual study? What are your thoughts on informal learning via social media, webinars, YouTube videos and more in order to enhance hard skills? Also, even within the more "formal" training environment, what's your reaction to the increased adoption of gamification techniques?

AR: AT&T Learning Services is very much involved in exploring various gaming technologies from simple WBT games that we've been doing for years, to mobile competitive quizzing, to high-end simulation using state-of-the-art gaming engines. We use these both formally and informally. We have been using video in training for many years but are seeing a huge shift to informal video and we've added two internal video hosting platforms to accommodate the latter. We also have significant and heavily used social media resources. As I mentioned earlier, our objective is to pull these things together for our employees so they are not wasting time searching in ten different places, or drinking from the proverbial internet fire hose of information. Informal learning is a huge trend and important link in the learning technology framework. Companies that develop a sound, holistic strategy in this area will succeed.

TS: Switching topics a bit, regarding the increased use of mobile devices in and outside of the office, do learning managers have a choice in the matter? How can mobile technology best be leveraged in the employee learning arena?

AR: As I mentioned, we are well into our second year of delivering training via mobile devices. In some business segments employees now have only mobile devices, so everything they consume is via their tablet. One of our biggest challenges in this area is creating and delivering training that is compatible with many different devices. And as AT&T is constantly adding to the mobile device offerings available, this is an ever-moving target. Ideally we hope to use a learning content management system to develop content once and deliver it to multiple devices. Currently, however, we find ourselves with two or three versions of courses for multiple platforms.

TS: What role do you think employee learning can play as part of the larger employee engagement strategy?

AR: It's huge. Our employee engagement survey results indicate that employees feel training opportunities and professional development are extremely important. The good news is that we do a great job at providing excellent learning opportunities for our employees. AT&T Learning Services and our sister organization, AT&T University (which focuses solely on leadership development) have taken 1st, 2nd, and 1st place for Chief Learning Officer's Learning Elite the last three years. I think this has to do with both the quality and quantity of our offerings.

TS: Finally, if you would be giving advice to someone just beginning their career in L&D, what would you tell them?

AR: Fasten your seatbelt! I firmly believe we are sitting squarely on a technology megatrend and learning architecture is in center field. Don't throw the baby out with the bathwater just yet, but what you learned in school and what works today may not be relevant or appropriate tomorrow. We will soon find ourselves facing five generations of learners in the workplace, constantly emerging and evolving technologies, and a dizzying array of informal and blended learning opportunities. Critically evaluate the needs of your learners and create the best learning approach with the tools available; never settle for "we've always done it that way." And finally, never stop learning! There are amazing resources available at your fingertips: LinkedIn, CLO, eLearning Guild, ASTD, ISPI, Bersin… the list goes on. Webinars, social networking, books, conferences – keep your skills up and your brain sharp!

Interview with Vanessa Walsh, Wells Fargo

Vanessa Walsh is Head of Leadership and Professional Development at Wells Fargo. Walsh, who has many years of experience in L&D – with a focus on organization development and leadership development – in the banking and financial services industry, shared her thoughts and insights into a variety of issues, including leadership qualities, mobile and social learning, and some advice to young professionals just entering the world of employee training.

Training Station: Why don't we start off with you telling us a bit about how you got into learning development and how you ended up at Wells Fargo?

Vanessa Walsh: *My background prior to Wells Fargo was in organization development and leadership development. Then I was head of OD and succession planning for California's judicial branch of government for a while. I was a terrible government employee, as I like change. I had a friend who was working for Wells Fargo, and said to me that he thought I would really like the culture here. So I joined almost 10 years ago. It's a fabulous organization and I've had the opportunity to move around quite a bit. I actually started as a learning and development consultant, and now I'm running leadership and professional development for the enterprise.*

TS: If you would try to define, in the learning development field specifically, but also in general, what it really takes to be a good leader nowadays in the enterprise, what would you say?

VW: *For a leader in general, and this is a lot of what the data is pointing to as well, people want to follow and be led by somebody who is really inspiring and motivating. And the good news is that you don't have to be a motivational speaker to be inspiring and motivating. There are multiple ways to be inspiring and motivating. What we're finding more and more though, is that it's not someone's technical expertise that*

makes him or her a great leader. They certainly have to have some intellectual horsepower, but they don't necessarily have to know all the ins and outs of the technical aspects of someone's job.

Why I think that's important is because as people transition from that role of individual contributor to manager, or leader, often times they're promoted because they're really good at what they do. What we're starting to focus on more is, 'OK that's great that you're good at what you do, but can you actually lead and manage other people?' That ability to inspire others to high performance, to motivate them and to provide goals where they are growing and learning, is critically important.

Additionally, an important skill is the ability to give feedback in the moment, on a regular basis and really have conversations about career growth and development. I think we're doing a better job of helping to equip managers with how to have those conversations and making that a more comfortable experience.

TS: In what way is working in learning and development in the banking and financial services industry unique?

VW: *I think what is unique about this industry right now, as opposed to ten years ago, is the heavy regulatory environment that we're in. Our training organizations need to be keenly aware of the regulatory environment, the pressures that are on our team members from a risk management standpoint. So, in some cases, we're doing training specifically as it relates to risk management, and to specific regulations, compliance training, that sort of thing. But, where that's really going to stick from a culture standpoint, of course, is to weave that through other courses of training as well. Every industry is going to have its unique factors, but I think that's a little bit different than, let's say the food industry. It's from a banking regulatory stand point.*

TS: As someone deeply involved in workplace training, what are some of the technological tools that are exciting you nowadays?

VW: *I'm most excited about the opportunities around mobile and social learning for our team members. Mobile learning can be used in a variety of ways. Not only is it a way to push out just-in-time information, but it's*

also a way to reinforce concepts learned through other modalities. So in it of itself, it can be a form of learning, and can support learning that occurs in a classroom, or a virtual classroom.

For example, if I'm a leader, I've gone through a coaching fundamentals course. It's been two months and I'm about to go into a difficult coaching conversation. Perhaps it's a job aid that I have on my desk [to access important information]. Or, if I'm travelling, I can just pick up my mobile device and go to my app, and look up those top five tips around having a difficult coaching conversation, and it's right there

"Learning at the speed of me," is what we're calling it. We have a whole generation of people coming into the workplace who have very different expectations around how they access information. We're working to meet those needs.

Same thing with social. If someone has a question regarding "How do I do X?" or "Where can I find Y?," either they're going out onto our portal and typing that in, just like they would in Google, or they're going out to the network, just like they're used to doing on Facebook. We're trying to create more of those forums within Wells Fargo so that people can do that, so that they can have that information at their fingertips because they have a trusted a group of people, or in some cases people they don't even know who have some great information for them in a very timely way.

So, I'm pretty excited both about the mobile and social space because I think that we can leverage them in a formal way to support our formal program but also provide some parameters around it where we can create a really rich, informal learning environment.

TS: Speaking to a lot of training professionals, there's always a dilemma between whether we should place a lot of the weight on the initial training period itself or on learning as a continuous strategy. People are frustrated sometimes because they put in a lot of information into initial training for new employees and only a fraction of the knowledge is actually retained and is easily able to be applied once he or she starts doing their daily work. What do you think the balance should be between training and

performance support, or learning as a long term continuous strategy?

VW: *We are employing the 70/20/10 model. 10 percent of learning happens in training, 20 percent happens from continued coaching and support feedback, and 70 percent happens from on-the-job learning. If you think about learning to drive a car, it's one thing to sit in a classroom and study all the laws and rules and how the clutch works with the gas pedal, but until you're in that car grinding the gears, stalling out in the middle of an intersection, you're not really learning how to do it. So we're starting to shift that balance a little bit more to a broader strategy around performance support.*

What that looks like varies across the organization, but I think there's less focus on throwing information at people and hoping something sticks, to whether we can give people information and skill building in manageable chunks and bites, so that they can go and test and learn and come back and get more. Coming back and getting more may be in a classroom but it could also be on a social site. We're really starting to focus more in the experiential space and allowing people's different methods to come together to talk about what it is they're applying in learning. Some parts of the organization are very early in that journey and some are a little farther down the road, but strategically that's the direction we're trying to go.

TS: Finally, you spoke earlier about the ability to inspire as a key quality that people are looking for in a really good leader nowadays. As someone with your many years of experience both in Wells Fargo and before, what advice would you give someone who is just starting their career employee training and development?

VW: *I think more than ever, we have a real opportunity in the space of technology and meeting the needs of millennials who are coming into the workplace. The way that we've done training in the past is not going to fly for millennials coming into the workplace. Even now, if we have a 2-day training program that's in person, asking people to put away their smart phones isn't even culturally acceptable for some generations. Multi-tasking is in some cases how people learn. It's something very important that new people coming into this industry now be in tune*

with the team member, and be in tune with the audience as a collective, in understanding how different generations learn, and how we must design learning solutions that are going to meet the needs of multiple generations, rather than a one size fits all.

It probably goes without saying, but there is also the importance of really strong communication skills. We have to be very crisp, clear, and concise about the information that is being shared, and really making things learner-driven as well, by pulling out information from the audience. And as we start to go into the virtual learning space, finding new and different ways to keep people engaged is also key. I think all of those are going be important. From a design stand point, it's the same thing. It's doing all that as well, on the back end, and making sure things are designed in a way that is appropriate for each audience.

The other thing I would say is measurement, measurement, measurement. I think we're all getting better at it, but in many cases we tend to just jump in and design training or learning because a client has asked for it, without really getting to the root of the issue, what is it that we are trying to solve for and how to we plan to measure that?

The final thing that I will say, is being willing to call it out when training is not the right solution.

TS: What do you mean by that?

VW: *Well, in some cases, if there's a particular organizational development need or intervention that needs to occur, training might not be the right answer. If there's a client that we're working with and they say, "I think we need some training on collaboration." It can be easy for the training partner to say "Great, we have a great program over here around collaboration, no problem, let's go ahead and implement that." As it turns out, there might be some cultural issues on the team that they need to work through. People aren't getting along, people aren't communicating well. And training is not going to solve that. That is more of a customized deeper intervention that needs to occur. So, it's important to ask those really tough questions on the front and consult well. And if training isn't the solution, be able to call it out.*

About WalkMe

WalkMe Inc., provider of the world's first interactive online guidance solution, helps training managers and strategists to accelerate employee time to competence and improve training effectiveness, ensuring a lasting impact on employee productivity while reducing training costs. Think of it like '*training* your software to work with you employees.'

WalkMe provides training managers with *WalkMe™,* an indispensable tool to enable new and existing employees, as they work, to easily and successfully complete their desired tasks. By using a series of interactive tip balloons overlaid on the software they are using, employee tasks are broken down into short, step-by-step guided instructions. As a result, both during the initial training process and beyond, trainers can empower their employees so that they no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid mistakes.

About the Author

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