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M103
The Profile of the Chief Learning
Officer

Doug Lynch, University of Pennsylvania

Agenda

- About Me
- Import of the role
- Methodology of Survey
- Results
- Some other data
- What are you doing?
- Penn's Program

About Doug and the University of Pennsylvania

- Oldest University in the U.S.
- Pretty good business school (Wharton)
- Ed school not bad either (GSE)
- Perceived as “innovative” among ivies
- Vice Dean @ school of ed trained as economist ; have worked with schools, universities, countries, and companies

Why is this conversation important?

- In a knowledge economy – recruitment, retention, and development of people #1 business strategy
- Average Fortune 1000 company spends 2.5% of operating budget on training - often 8 figures
- NCES - 90+ million adult learners (50% of adults, 70% of all students)
- Not only bottom line, also public benefits to the work

Managing Talent: Make or Buy Decision!

- How do you supply talent to meet org needs when
 - Demand impossible to predict
 - Supply hugely variable.
- What are cost/benefits if you buy?
- What are costs/benefits if you develop?

So Development better, but job harder

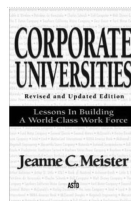
- **In 1950's Average Fortune 500 exec 24 years with the firm; less than 3 years now.**
- **2003 SHRM Survey 70% no succession plan versus 70% had one 25years ago.**
- **2004 IPMA 63% have no workforce plan.**

So...

- So, job is important but hard
- Also it may be undefined.
- There is no credential for the leaders of this world
- We need to understand learning executive population

Some History

- **1981: Bill Wiggenhorn** founds **Motorola University**
- **Mid-1990s: Jack Welch** gives **Steve Kerr** the title of **CLO**
- **1999: Jeanne Meister** publishes “**blueprint**” for corporate universities
- **2000: *Business Horizons*** article profiles **10 pioneering CLOs**



Some History

- 2002: T&D article – “Meet The New Chief Learning Officers” discusses competencies
- 2002 (Sept/Oct): CLO Magazine debuts; “The CLO’s Role”
- 2004: ASTD publishes updated competency model for workplace learning professionals



Some History

- 2004: ASTD Launches LXN
- 2004: First CLO Symposium in Dana Point, California
- 2006: ASTD / U Penn publishes research on 92 CLOs in “Profiling A New Breed of Learning Executive”
- 2006: Penn launches program for CLOs

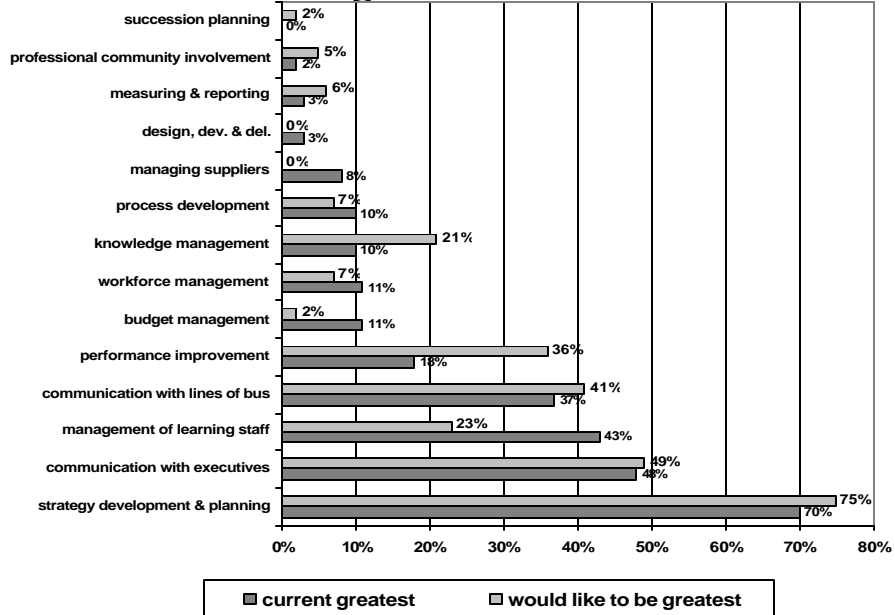
Methodology of sStudy

- Last year we surveyed Learning Executives
- Received 153 responses, selected 92 that represented companies with over 100 employees and training budgets over \$1 million.
- Companies ranged in size from \$10 million to \$200 billion in revenue, and had training budgets of up to \$100 million and employees up to 50,000

About the Position

- 14 % use "CLO" as title
- About 80% are either "director" or "VP" of "training" and/or "learning"
- Average tenure is 5 years
- 65% report to HR
- Average "faculty" was 583 with 6,000 as the high end
- 58% had corporate universities

What Learning Executives do



What they Control

Amount of Control	Staff	Budget
Total (100%)	1/3	1/3
More than half (51-99%)	1/3	1/3
Half or Less (0-50%)	1/3	1/3

Control continued...

- Centralized elements – technology infrastructure, content design & development, and strategy
- Decentralized elements - delivery, budget, planning, and performance improvement

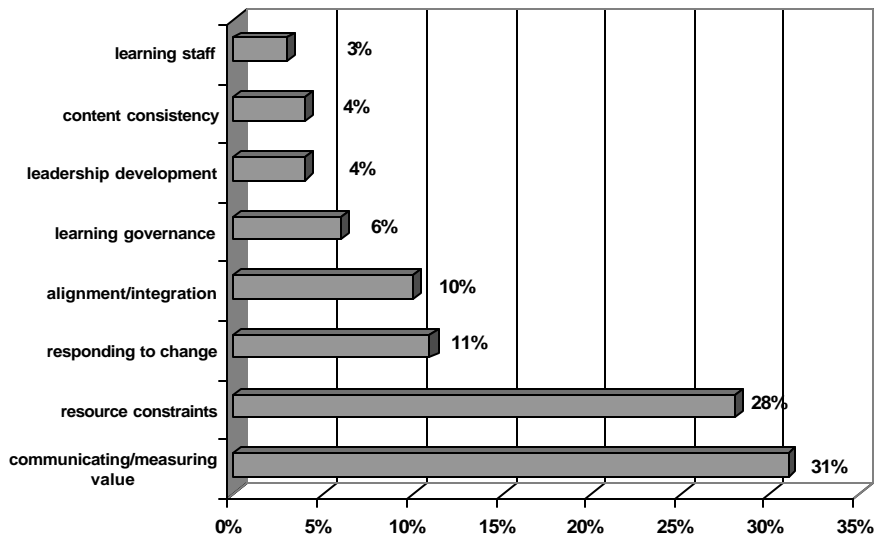
Prototypical Learning Executive

Age	89% over 40, 50% over 50
Gender	54% Male
Ethnicity	91% Caucasian
Years in Position/Org/Sector	5 yrs /10 yrs /13 yrs
Education	90% Masters, 30% Doctorate
Primary Job Tasks	Strategy, Planning, Communicating, Managing
Greatest Challenges	Communicating Value, Resource Constraints
Career Aspiration	CLO at Larger Org

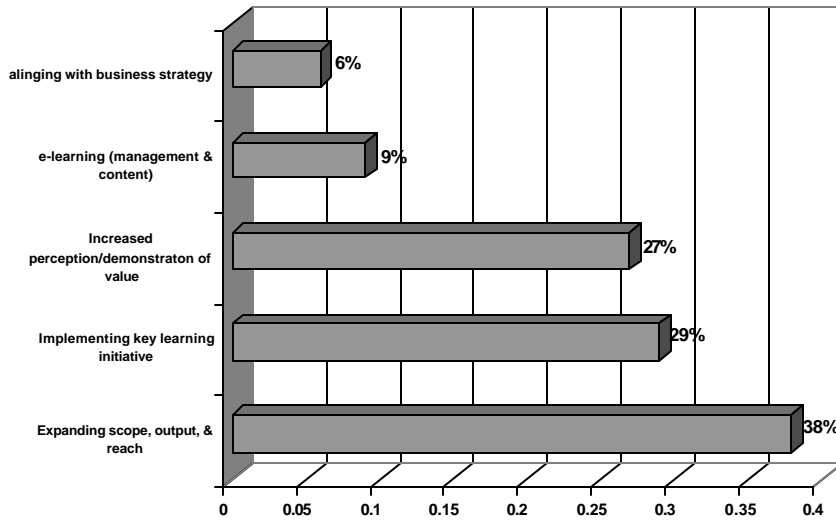
Diversity of Background

Job area	Worked	Usefulness
Organization development	61%	3.85
Business administration/ management	62%	3.78
Corporate learning	84%	3.77
Customer service	43%	3.67
K-12 school administration	4%	3.67
Human resources	66%	3.52
Government/public/social services	5%	3.50
Assessment /Psychometrics	16%	3.44
Information technology	14%	3.43
Sales/Marketing	31%	3.36
Academic teaching	41%	3.22
Research	16%	3.22
Academic administration	16%	3.17
K-12 school teaching	20%	3.10
Military service	9%	2.79

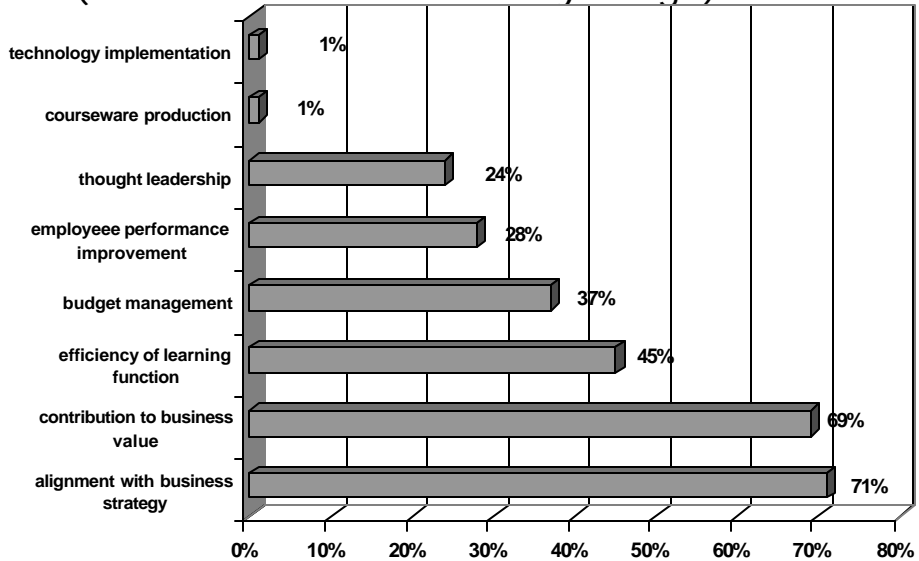
Learning Executives' Challenges



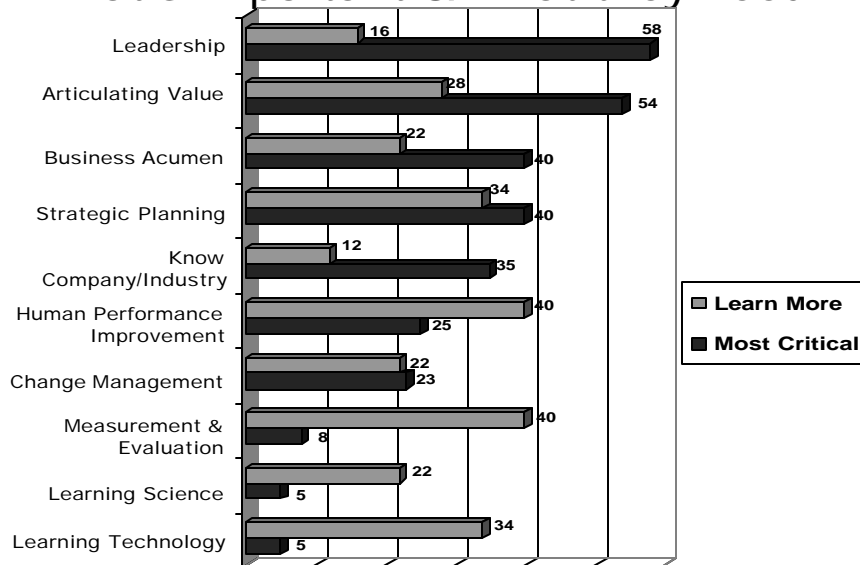
Key accomplishments



How Learning Executives are evaluated (select 3 that most heavily weigh)



What's important & what they need...



What are the top 5 skills/competencies necessary for success today as a CLO?

1. **Workplace Learning/Leadership Development/Talent Management Expertise**
2. **Financial/Business Acumen**
3. **Salesmanship, Marketing, Negotiation, Influencing Skills**
4. **Measurement & Impact Analysis Skills**
5. **Leadership Skills (Level 5, Managerial Courage, Ethics, Visionary, Presence, Strategic/Systems Thinking, Change Management Skills)**

Other responses included: Project Management/Execution Skills, Consulting Skills, Global Experience, Learning Agility, Resilience, Employee Engagement

(Conference Board Council CLO responses)

What are you doing to close that skill/competency gap?

1. **Build personal, team and organizational capabilities in analytics**
 2. **Participate in Communities of Practice (Conference Board, LearnShare)**
 3. **Attend professional programs and conferences (ASTD, CLO, Training, Masie)**
 4. **Stay abreast of current research, literature (Trade magazines, Corporate Leadership Council)**
 5. **Build business acumen through greater exposure to company line operations as well as site tours, interviews and "face time" with customers**
- (Conference Board Council CLO responses)

What are you doing to develop your successor?

If no current internal successor present, responses included:

- **"Find a savvy business leader (not a learning professional)....and after a 3-month orientation, hand-off"**
- **"I will have to buy talent from outside"**
- **"Stay in touch with "who's who in other companies; I am always talent scouting"**

(Conference Board Council CLO responses)

What are you doing to develop your successor?

If current internal successor present:

- **Create aggressive developmental plan leading "out-of-comfort zone" work challenges or complex projects**
 - **Include individual on key projects**
 - **Provide opportunities to interact with executive management**
 - **Support professional credentialing:**
 - **Encourage him/her to earn a Ph.D. (industrial/org psychology; work-place learning)**
 - **Encourage attendance at CLO Academy**
 - **Provide exposure to professional network**
 - **Provide cross-divisional/rotational/global/stretch assignments**
- (Conference Board Council CLO responses)**

Conclusions

- Job is about aligning learning and communicating value
- Education & Business knowledge/experience important to success
- Mandate is to improve learning efficiency and improve performance
- C-Team "trust" is the X-factor
- Need a master plan for developing the profession!

Penn CLO Advisory Board

Mike Barger, jetBlue
Edward Betof, BD
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Joe Bonito, Pfizer
Skip Brand, JWire
Maude DiVittis, MTV
Kathleen Gallo, NSLIJHS
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HUP
Jim Sheehy, Freddie Mac
John Smith, Reed Smith
Luther Tai, Con Edison
Bill Wiggenghorn, Main-Captiva

Program Outcomes

- For the organization – impact through education. The skills and knowledge acquired, in addition to actual work done in the program, will immediate impact the student’s organization.
- For the student – the student will have the skills, knowledge, and network to be thought leaders in this profession. Whether their goal is to be a CLO or to provide learning services to an organization or to be a faculty member, this program will prepare student to succeed.
- For Penn – we want to create the network of thought-leaders globally when it comes to work-related learning.

Structure of the program

- Executive, not “part-time”
- Blended approach, grounded in work
- Multi-school
- Multiple credential
- Research/dissertation grounded in work

The thematic blocks...

- Organizational Leadership – functioning at the “C” level
- Work-related learning and performance leadership
- Leading work-related learning using data and decisions based on evidence
- Business skills for the work-related learning leader
- Using technology to support and enhance work-related learning
- Dissertation Block

Structure of the program

- Each Block has a "Canon." For Block One:
 - Collins, James C. *Good to great : why some companies make the leap--and others don't.*
 - Florida, Richard L. *The rise of the creative class : and how it's transforming work, leisure, community and everyday life.*
 - Heifetz, Ronald A. *Leadership on the line : staying alive through the dangers of leading.*
 - Ram Charan, Drotter, Stephen, & Noel, James. *The Leadership Pipeline: How to Build the Leadership-Powered Company .*
- Each Block has "lycea." For Block One:
 - Bob Boruch. *Does Research Matter?*
 - Greg Urban. *What Anthropology can tell us about Corporate Culture?*
- Each Block has "ADs."
 - Their role is to students' needs and the objectives of the program, and ensure that the faculty are up to speed. They help students make connections between the learning and applying the learning back on the job. For block one:

Block 1: Organizational Leadership: CLO as Strategic Leader – content areas

Individual
Effectiveness

Organizational
Leadership

Functional
Leadership

Block 2: Work-related learning and performance leadership

Foundations of Learning

Individual Learning

Social Learning

Organizational Learning

Block 3: Business skills for the work-related business leader

Management

Operations

Finance

Marketing

Dissertation Block

- Define a problem that is important to their employer
- Frame the problem within the relevant literature
- Review what has been tried before to solve the problem
- Develop a method or approach to address the problem
- Collect and analyze relevant data about the impact
- Contain a set of conclusions and recommendations for further action
- Written plus Defense Colloquium

Faculty – Wharton, GSE & CLOs



Inaugural Cohort

VP HR, Staples, Inc.

CLO, JetBlue

Learning Director, Xerox

Exec Director, WFDev.,

Minnesota

CEO, Freemont College

Senior Director, Wharton

Director of Learning, J & J

VP Learning, Chubb

Director of Training, CHOP

Director of Learning, Lehigh

Valley Hospital and Health

Network

Senior Director Learning, TPI

Director of Learning,

Constellation Energy

VP Learning, Fifth Third Bank,

CEO, Corporate University

Exchange.

CLO, Google

Director of Learning, Ritz

Carlton

Director of Learning, Mattress

Inc.

Director of Learning, Mondavi

Wines

Director medical training USAF

