



A FORMULA TO MAKE LEARNING AND DEVELOPMENT STICK

by Jack Zenger, Joe Folkman and Bob Sherwin

If you were to ask 100 people in our profession for the biggest challenge they face, we believe 90 or more would talk about ways to improve implementation. They would not talk about new concepts to teach or dramatically different learning methods. Participants leave our events with the best of intentions. Then something happens. They get back to the job with all of its pressures. Good intentions evaporate. Commitments are deferred. Little, or sometimes nothing, of what the person learned is transferred onto the job. The Holy Grail in our profession is to find the solution to this problem.

Why has this happened? And why has it plagued us for so long? What is there about this entire process that has us invest so much time and effort in the development process, only to have it unravel when people get back on the job?

Our analysis suggests that effective implementation demands 4 elements to be in place. These elements are:

1. Self-motivation of the participant.
2. Accountability on the part of one or more people in the organization to insure that new behaviors are implemented.
3. Visibility about what actually takes place when people return to their job.
4. Follow-up tools that require people to report on what they've done, and keep their commitments "top-of-mind."

THE FORMULA

Here's the formula:

$$I = M \times A \times V \times F$$

Please note that there is a multiplication sign between each element of this formula, not an addition sign. This reminds us that if any one of these elements is missing, the end result will be "zero." Or, if even one element is extremely low, the result will be drastically reduced.

ANALYZING EACH ELEMENT

Implementation

"I" represents the degree to which people return to their jobs and actually implement what they learned. To what degree do they follow through in a timely and effective way? How much of the learning investment – really – do they take back and immediately begin to practice and apply on-the-job? We've often referred to research done in this area by our colleague, Dr. Brent Peterson. His conclusions suggest that half of the gains from our learning investment come from learning follow-up activities. But rarely is that the amount of implementation effort we see taking place in organizations. While half of the gains come from follow-up activity, less than 5% of our efforts are put there.

Motivation

"M" equals the personal motivation of the participant. Some people are highly motivated to succeed and continually improve. Personal change begins with an inner

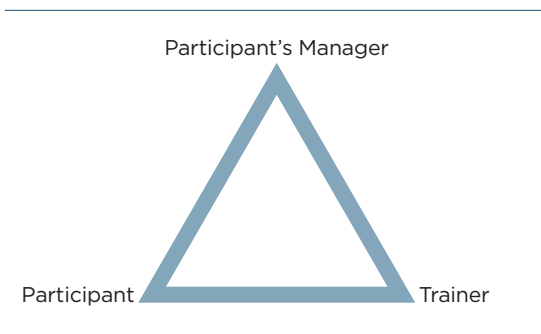
drive to get better. A person rarely changes if they are not motivated. Therefore, if this element of the formula is zero or low, it is unlikely that much implementation will occur. As people become older and more senior in the organization, there is a greater tendency to think themselves beyond change and development. The most effective leaders, however, are constantly seeking ways to improve their performance and create the updraft that pulls others with them.

A remarkable example of that was Andrall Pearson, Chairman of YUM Corporation, who in his mid-80s made major changes in his approach to leading people. Renowned for his tough style, he learned that there were better ways to unleash the energy of the people in the organization. He changed from a "command and control" leader to one that practiced listening to people at the lowest levels and involving those who had previously never been consulted.

Accountability

"A" represents accountability. Here's one important insight, that could be described as a blinding flash of the obvious: in most organizations no one is accountable for implementing what is taught in a development program. Imagine a triangle with the trainer at one corner, the participant at the second corner, and the participant's manager at the third. We submit that two of these believe the other two are responsible for implementation, and one is somewhat vague and uncertain about it.

The trainers or facilitators give it their all during the session, and then smile as the participants leave, assum-



Learning and Development's Bermuda Triangle:
Where Accountability Vanishes

ing that it is largely up to them and their managers to implement what they have learned. The facilitator muses, "If these learners are not entirely responsible, surely their managers share some responsibility to ensure that the participant implements what they have learned. But, it

most certainly is not 'my' responsibility. After all, I have no way of seeing how these skills are actually applied on the job."

The manager has seldom been directly involved in the learning process, and is not intimately familiar with what was taught. So, the manager assumes that between the participant and the trainer, they are responsible to make something happen. No one has ever suggested that the manager is accountable to make that happen. In most cases, the manager many not even know what plan the learner committed to follow upon returning to the job.

The participant usually feels some responsibility for implementation, but returns to work and discovers that there is little or no encouragement, nor any reinforcement for making change. That's a huge "mixed signal." Work has piled up. No one asks about what was learned. In fact, upon returning to the job the learner is immediately asked to "report back" on sales, service, quality, and other on-the-job activities. But there are no discussions or scorecards asking the learner to report back on activities supporting learning transfer. The participant tacitly concludes, "I guess that was some interesting information I needed to hear, but no one really seems concerned about whether or not I apply it, so..."

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We believe that this is mostly an erosion process; not a deliberate rejection of what was learned. But lacking any incentive or attention from either the deliverers of the learning, or expressed concern from the manager, what was learned is quickly dismissed as unimportant or irrelevant.

We trust that it is readily apparent that the maximum implementation will occur only when each of these three parties accepts their role in making it happen and takes their share of accountability.

Implementation will occur when:

- the participants are clear about what they are to do when they get back on the job, and feel responsible to make it happen
- managers recognize their responsibility to know what was learned, look for indications that this informa-

tion or new skills are being used, and give positive reinforcement when it happens

- those who deliver learning and development assume some responsibility to know what happens when learners are back on the job and find ways to encourage follow-up activities

Visibility

“V” in our formula represents visibility. Even if either the trainer or the participant’s line manager were intensely interested in what got implemented, how could they possibly obtain that information? In a few instances, the manager may be in a situation to observe it. The sales manager who makes customer calls with a salesperson can see what is applied from the sales training program. A customer service manager who listens in and monitors service calls can evaluate the application of newly learned phone skills. But those examples are the exception, not the rule.

Why haven’t organizations made any attempt to measure the impact of development programs? Why aren’t they making results visible? One big reason is that they haven’t had an effective, economic vehicle to make that happen. We lack non-intrusive, efficient mechanisms by which information could be collected. There haven’t been any simple information gathering systems that would make learning more visible. Thus, neither the manager nor the trainer have had an effective line-of-sight into what people are doing with what they learn when they return to the job.

On average, organizations spend \$540 per year per employee for their development. If the organization had

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given them \$540 to lease a new computer to enhance their productivity, they would monitor its usage and insure that it had not been lost or left home. But, the \$540 spent for the employee’s development is almost never monitored. The

organization hopes something will occur, but it is usually vague and unclear about what that is.

The amusing part is that when participants attend a learning and development event, several measurement processes are unleashed. They are asked to evaluate the program, the faculty, the facilities, the food, and the content. Questionnaires are frequently sent when they return to get their later evaluation of the program. What is virtually never

measured is what the participant learned or what they did differently.

Some have argued that we really do not want to know the answer. Whatever the subconscious reasons, lack of clear visibility is a major cause of implementation work not happening.

Follow-up

“F”, the final ingredient in our formula, represents ‘follow-up.’ One of the key ingredients for the implementation of any learning and development is diligent follow-through. If learning is simply an event and materials are put on a shelf to be forgotten, then, most assuredly, these skills or information will not be implemented. The pace and pressure of work drives out the participant’s good intentions.

While few of us like it, there is much truth in the aphorism, “People don’t do what you expect, they do what you inspect.” While expectations can be very powerful, they have to be reinforced by palpable actions. Expectations get created and reinforced by what management chooses to monitor and review. When CEO’s began looking seriously at quality in the 1980’s and 1990’s, they started asking questions. Measurement systems and quality measures sprang up everywhere, results became very visible, and quality initiatives got much needed attention. More recently, Balanced Scorecards are being adopted to answer executive questions about broad organizational performance. The questions these scorecards are trying to help answer are setting additional new expectations, driving new measurements, and focusing attention on key business measurements other than just sales. These “follow-up” inspections are reinforcing what business leaders want to make happen.

Admittedly mixing metaphors, there’s another relevant old saying that “the best fertilizer is the gardener’s shadow.” Our belief is that paying more organizational attention to follow-up activities can have that same payoff in our implementations and learning transfer.

WHAT’S BEEN MISSING FROM THE FORMULA?

Let’s quickly note what has not been missing. Some participants have always been personally motivated to take what they learn and do something with it. They are dedicated to self-improvement. They are highly motivated. They agreed with what they learned and believed that it would make a positive difference. Their pride gives them incentive to follow-through.

But, we will argue that the remaining 3 elements of the formula for effective implementation have in most cases been missing.

1. Accountability has seldom been defined. In most organizations, it is not clear who shoulders or shares the responsibility for applying learning.
2. Visibility has been largely non-existent. There have been no good tools to cost-effectively collect data about what participants actually did when they returned to the job.
3. Follow-up has been rare. Again, while many alternatives for follow-up exist, most are time consuming and expensive. While there have been a variety of techniques available, most professionals in the learning and development arena would readily agree that little follow-up has actually happened.

CONCLUSION

That is our analysis of why implementation has not happened. We have been missing several of the key

ingredients required to make it occur. Given the stakes in this game, we are convinced that good solutions will be found.

Indeed, promising new products and services are now being introduced that:

- signal accountability
- provide visibility to the learner, the manager, learning and development professionals, and the organization
- follow-up in a cost-effective, non-intrusive way

In the final analysis, individual learners must possess a certain amount of self-motivation if this is to work. But by having the other three organization elements of the implementation formula in place – accountability, visibility, and follow-up – we'll go a long way toward improving our implementations. We are optimistic that we are now entering into an entirely new era in which these elements will help us make huge strides in implementing our learning and development efforts more successfully.

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If you are interested in discussing how your organization can increase profit through extraordinary leadership, please contact Zenger Folkman. We welcome the opportunity to talk with you about how your organization can develop extraordinary leaders who have the competencies to maximize profits for your organization!

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