

Forward Looking Insight

Integrating a Strategic Priority into Learning: Duke CE and IBM Work Together to Enable a New Profession

by Suzanne DeWitt & Jane Sommers-Kelly

The Challenge

In May 2008, IBM brought together three global organizations – Marketing, Communications and Corporate Social Responsibility – under the leadership of Senior Vice President Jon Iwata, part of the IBM leadership team under Chairman and CEO Sam Palmisano. The powerful combination of these three groups of IBM professionals led to a fundamental shift in IBM Marketing & Communications (M&C) job roles. Iwata considered this to be the start of a new profession, as he explained to the Institute for Public Relations in his Distinguished Lecture on November 4, 2009:

“It is not [just] the combination of marketing, communication and corporate social responsibility ... though, that is what IBM did last year. ... It has put us together to create something new, something that our company – and perhaps every company – needs, because the world in which we operate has changed.”

Jon Iwata, Towards a New Profession: Brand, Consistency and Eminence on the Global Commons

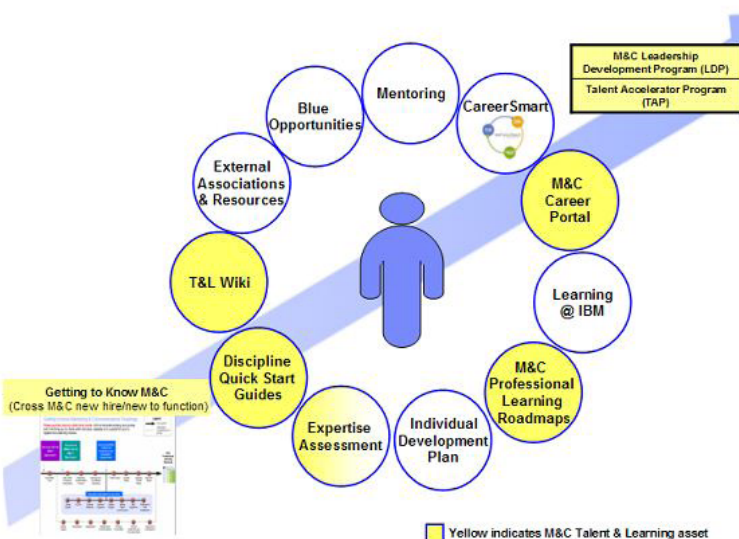


Formulation of the Challenge

The newly formed IBM M&C Talent & Learning (M&C T&L) team was challenged with responding to this change by developing education and talent programs needed to support this new profession. As Iwata highlighted, this was much more than pulling together the existing learning assets from the three separate organizations, but rather required a redesign of the M&C disciplines, job roles and required skills before the appropriate learning and development plan could be built.

The IBM T&L team approached this by defining what was required of a “T-shaped professional” in the new IBM M&C function. A T-shaped professional can both “go deep” in their respective job role but can also “go wide” across the full spectrum of M&C in order to make key strategic decisions. The T&L team used internal IBM Subject Matter Experts (SME’s) to define what it meant to “go deep” in each M&C discipline. IBM M&C turned to Duke CE, its established partner in Learning & Development (L&D), for help in defining new education to help M&C professionals “go wide,” focused on the more strategic topics required for leadership within the profession.

After extensive analysis, focus groups and executive input, the IBM M&C T&L team established ten cross-M&C skills required in the new profession. These skills, along with the discipline-specific skills, are used in the annual IBM Expertise Assessment process in order to identify skill gaps and develop Individual Development Plans.



continued on next page ►

Ownership of the Business Challenge

IBM Marketing & Communication T&L's Suzanne DeWitt was tasked with creating the learning solution for cross-M&C skills. She came to Duke CE to brainstorm on how participants could acquire these new methods of thinking and problem solving. The first cross-M&C skill that required focus was “apply innovative thinking for insights,” which was defined as follows:

Demonstrate ability to see a situation holistically, see long-term and short-term implications, connect/apply diverse concepts, and develop progressive yet realistic insights and approaches. Apply fact-based decision making and critical thinking while infusing creativity to solve difficult problems and develop workable solutions on a timely basis. Identify both IBM and external resources, span organizational boundaries, consider issues from multiple divergent perspectives and explore multiple alternatives in search of ground-breaking solutions. Use creative thinking. Synthesize these perspectives from within and outside IBM, leveraging the IBM enterprise to create innovative solutions and increase opportunities to grow ahead of the market.

Other Stakeholders

In each region of Europe, Asia-Pacific and Americas, a regional exec involved in Smarter Planet was involved in and delivered a part of the program, so the ownership was shared between the lines of business and human resources.

Strategy

The immediacy of the program was critical to fulfilling the strategy and progress. You could not wait 24 months (the average for a learning program timeline) for this type of rollout. The strategy could not wait 1-2 years for employees to get this. M&C T&L and Duke CE successfully rolled it out in four-months – all within the budget.

Duke CE made it a priority to listen and understand the company strategy while it worked with IBM to create a solution that matched its needs, culture and budget. To help IBM implement its strategy, the program set out to develop individuals in the context of these strategic capability needs.

The Desired Impact

The desired impact of the program was for IBM M&C professionals to think more systemically about the world around them and the challenges facing IBM clients - connecting dependencies and consequences across functions and systems. Only by anticipating changing market dynamics and translating those into terms that are relevant to clients, can IBM M&C professionals develop marketing and communications programs that resonate in the market.

The Commitment

The Necessary Changes

The design team of Duke CE and IBM first assessed IBM's business challenges, specifically within M&C, of delivering on the new competencies through discussions with IBM's global learning team and several IBM business executives. Secondly Duke CE moved to interviewing the participant population as to what was missing, what did they not understand or do within these new competencies. This allowed Duke CE to create a high level three-day design within the budget and time parameters. Duke CE then moved into experiential learning as one way to get the employees upskilled.

continued on next page ►

Deliverables and Impact

IBM asked Duke CE to deliver the program immediately virtually, which Duke CE did within four months of first meeting, to a group of 22 hi-potential employees from different geographic regions. Secondly, a series of face-to-face deliverables in their three main geographic regions: Americas, Europe and Asia-Pacific.

Financial Parameters

Duke CE and IBM agreed to do the first delivery virtually to avoid travel and lodging costs. It is important to note, however, that the e-learning modules cost approximately the same as the face-to-face deliveries, as the same amount of work was involved. The virtual delivery included recorded thought-leader classes and live webinars, so in fact, it took at least the same amount of time, if not more, to capture these messages and ensure its delivery was as effective as a standard show-up-and-teach face-to-face classroom model.

When the face-to-face programs were delivered, they were broken out by geography to avoid trans-continental travel as well as to customize to regional client preferences. Overall costs were kept to a minimum in design and delivery to fit IBM's budget and the recessionary context.

The Design Team incorporated both aspects of value: maximum business relevance and minimum cash out, as depicted below.

Formula for Client Value



Guaranteed Commitment

M&C T&L team members from each geography were involved in final design. Line business executives were thoroughly briefed in one-on-one phone conversations, and their input was fed back into the design.

continued on next page ►

Timeline

The contract was signed in December 2008, with the first virtual delivery in March 2009. The first face-to-face delivery was in August 2009, then six more by the end of the year, with two additional deliveries in 2010.

The M&C L&D Initiative: Forward Looking Insights

Learning Objectives

The program was designed to the following learning objectives:

- To translate global trends and insights to maximize the relevance of IBM's offerings
- To explore new business models and encourage broadening thinking
- To identify opportunities and threats amidst disruptive events
- Develop participants' appreciative inquiry and listening skills to hear new insights from customers and colleagues.

The goal was for each individual was that he or she would achieve the following learning outcomes:

- Thinking systemically, identifying root causes and seeing interdependencies in clients' problems
- Leveraging strategic sustainability: understanding what companies are doing enterprise -wide to take advantage of the need to be more resource efficient
- Applying the new business models emerging which are driven by global trends and technology

Duke CE designed to outcomes, and was able to articulate the need and the solution in the context of IBM's goals. It is about being focused and targeted and doing what you say you are going to do. We have to be prepared to build, change, eliminate and start again. We together were focusing on building new approaches and routines that enabled better solutions back on the job when it was needed.

Learning Methods

Duke CE used a broad range of activities to appeal to different learning styles and to help make the learning relevant, including behavioral learning exercises, robust dialogues between 2-3 people, visual arts and multimedia. Working with IBM to determine which method achieved the most impact given the company context and culture, we drew on the team's diverse backgrounds to imagine what was possible.

A particularly unique method employed by the team was Duke CE's Metaphoric Experience™ – the Municipal Marketplace described below - that took the participant out of his familiar environment, forcing him to experiment with new perspectives in an unfamiliar but compelling context – advising the CIO of Dubai in this case. This provided a new perspective on the more familiar workplace role and allowed the participant to think differently about what IBM and he or she can do to make an impact in that role.

This experiential method was an aspect of this program's success, and was driven by IBM's new strategic focus under the Smarter Planet umbrella.

On November 6, 2008, IBM CEO Palmisano spoke to the Council on Foreign Relations and outlined the Next Leadership Agenda – A Smarter Planet. While the Forward Looking Insights course design was already underway, the IBM and Duke CE design felt that it was critical to

continued on next page ►

incorporate the idea of making the world smarter – more instrumented, interconnected and intelligent – into the course design. The experiential method seemed like a perfect opportunity to incorporate this emerging IBM strategy into the Forward Looking Insights course.

Using IBM executives and client stories, Duke CE created a four-hour experiential method, “Dubai Municipal Marketplace,” in which the participants worked in teams and presented Smarter Planet recommendations to a client, in this case the CIO of Dubai. Using this method, participants dove deep into specific examples of the potential impact of IBM solutions on various city systems, be it in using analytics software to predict water shortages or linking consumers with electricity grids’ supply and costing information to reduce consumers’ energy consumption.

One critical success factor of the program was to tie the learning experience back to the business.

Learning Environment

Duke CE and IBM agreed to do the first delivery virtually. The virtual delivery included recorded thought leader classes and live webinars. Additional deliveries were face-to-face in IBM venues in Madrid, Singapore and Research Triangle Park, adapted by geography to customize to regional client preferences.

Measurement

Two levels of impact were measured and a third unexpected outcome also helped us prove business impact.

The first level of measurement was evaluations upon program completion, where participants said the orchestrator and learning were very high energy and relevant. The second: Back at work, where participants felt more able to take the lead within their project teams on assessing a solution, and more confident posing questions to assess the full spectrum of the underlying issue at hand.

Roles and Alignment

IBM’s owner of FLI, DeWitt, stayed tightly involved with Duke CE’s design team for both the virtual, for most important decisions made in both the virtual delivery and face-to-face. Regular calls and face-to-face meetings and a formal After Action Review process after the virtual delivery to leverage the learnings gained for the future face-to-face deliveries.

Duke CE was responsible for creating the content and how it connected together, ensuring relevance to IBM’s priorities. IBM was responsible for ensuring business relevance of this content and related activities.

The Impact

Indicators of Impact

Participants completed evaluations upon program completion, and executives observed changes back and work and asked for informal feedback.

The third measure of impact was unsolicited demand for the program to be run again. Two participants asking Duke CE to run the program again in each of their regions, one in India six times for IBM’s clients and one in North America. This reflected that it was a burning issue and how timely and critically Forward Looking Insights and Smarter Planet were to IBM.

continued on next page ►

One regional business-line Director from Growth markets, based in Singapore, said: “the Forward Looking Insight program was tightly linked to our new strategy and dealt with context not content. The creative experiential methods deepened the impact and helped us move our agenda and Smarter Planet forward...”

Actual Changes and Ultimate Impact

In addition to participants applying Smarter Planet solutions, demand was generated among clients in at least one geographic region that we know of already: India.

An executive and participant involved in the first four offerings of the Forward Looking Insights course found the Dubai Municipal Marketplace Method so compelling that she asked Duke CE to redesign and deliver it to 300 of IBM India’s CIO clients. In these six client deliveries, the experience engaged these clients not only in Smarter Planet solutions but also the results of a global CIO survey IBM wanted to share. IBM said they were particularly pleased with the deliveries, as more than half of the clients submitted a “free ticket” request for further consultation with IBM on Smarter Planet solutions. Demand generation, the holy grail of client events, had been achieved.

Customers/Products and Services

The ultimate impact on IBM’s business is still being measured but one immediate tangible example is the demand generation with these Indian CIO clients: This Duke CE intervention was by far the icing on the cake...it opened doors with our C-level audience...two of them (in Calcutta and Hyderabad) took it and wanted to replicate it for their teams.

Perceived Impact to Stakeholders

One business line stakeholder in North America felt the impact was so positive that he asked to run the workshop for a wider audience at a Forum of non-employees. The fact that he invested his business in it financially reflects its worth and presumed impact on his extended team.

IBM was asked to speak to the Wall Street Journal about its new strategy and this program in an October 2009 article:

One reason for the heightened interest in social responsibility is that companies seeking to expand globally need to first understand what social issues matter most in their target countries, [according to] Gil McWilliam, an executive director at Duke [CE].

...IBM collaborated with Duke [CE] to offer Forward Looking Insight, a hands-on exercise to educate the firm’s emerging leaders on the needs of the developing world, says Suzanne DeWitt, program director of education and leadership development.

Taught in Singapore, Madrid and Raleigh, N.C., the program aims to help company managers expand technology offerings and sell products abroad.

“It’s very important that we go through that step in expanding their thinking,” says Ms. DeWitt. “Certainly we are bringing [the concepts] down to earth, to their particular business unit and their role in the company.”

Dizik, A. (2009, November 19). Networking for Social Responsibility. Wall Street Journal.