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## ***Get More! Spend Less! Successful Training Partnerships!***

**Session Number: W315**

**Derek Hann**

Director

Strategic Talent Management

Pitney Bowes, Inc.

Office (203) 351-6579

Email: derek.hann@pb.com

**Lisa Zoba**

Regional Director

American Management Association

Office (732) 651-8622

Email: lzoba@amanet.org

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1:15 pm – 2:45 pm

Format ..... Concurrent Session  
Track ..... Learning as a Business Strategy  
Learning Approach ..... Case Study  
Target Audience ..... Learning Executive

### ***Application Focused Learning Objectives***

Benchmark your own organization against the challenges, issues and requirements critical to the success of a corporate university partnership.  
Develop an action plan to apply best practices to your own training operation.



## *Pitney Bowes Overview*

*(2004 ... Fix it now!)*

Corporate Profile / Strategy:

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HR Initiatives Strategy / Needs:

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Business Unit Needs / Corporate Culture

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Market / Customer Influences

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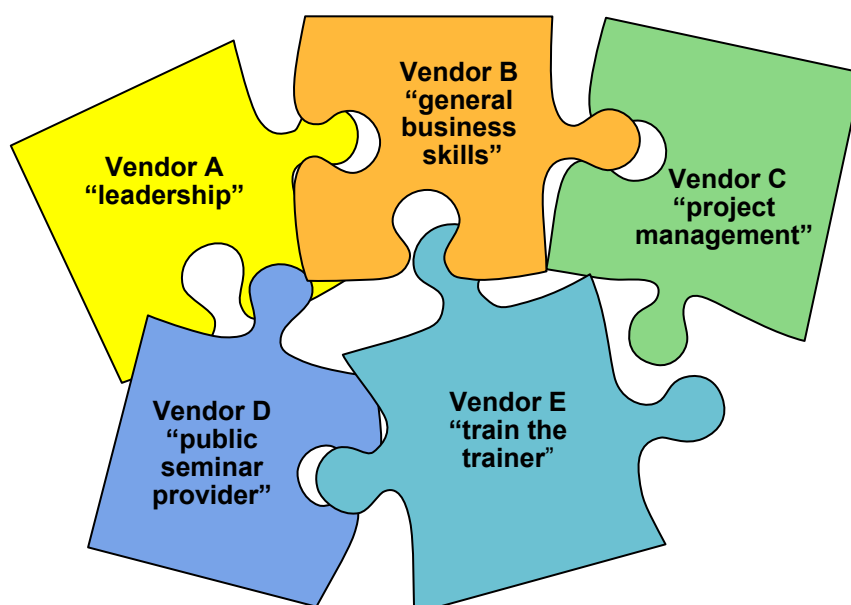


## Exercise One: Analyze Current Situation

You are responsible for the training operation and team. The HR EVP has asked for your analysis. What are the problems or issues you're experiencing with the "Quick Fix" solution? What is the potential business impact or implication (to the business and / or the training organization) associated with the problem?

Work with a partner to identify the potential problems and issues associated with the "Quick Fix" solution and list them in the left column. Identify for each issue / problem, the corresponding impact to the business / organization of the "Quick Fix" solution and list on the right. Individuals / teams will be asked to debrief findings with the larger group.

"Quick Fix" Solution: Issue / Problem	Business Impact
<ul style="list-style-type: none"> <li>Multiple vendor engagements</li> </ul>	<ul style="list-style-type: none"> <li>Consumed 40% of budget</li> </ul>
<ul style="list-style-type: none"> <li>Multiple messages</li> </ul>	<ul style="list-style-type: none"> <li>Building our leadership brand</li> </ul>
<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
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## Exercise Two: Decision Criteria Mapping and Ranking

### 2005 / 2006 Roadmap to the Future: Decision Criteria Mapping and Ranking

You own the Learning Strategy. You and your team have discussed the long-term impact to the business and training organization associated with continuing with your current solution. In addition, the CEO has an ambitious plan to achieve several organizational goals this year. You must also consider how these additional business drivers will weigh in your decision-making and solution.

Based upon this analysis, you and your team are identifying and prioritizing the requirements that will improve your function's responsiveness to the business units and the employee population.

Rank the decision criteria in order of importance as you see them from the CLO perspective (1 as the most important, and 10 as the least important). Individuals / teams will be asked to debrief findings with the larger group.

	Business Impact / Drivers	Decision Criteria	Importance
 <p>1 = Most Important</p>	Budget challenges	Consolidate "buy"	
	Credibility for strategic learning services	Recognized training industry leaders / leadership "buy in"	
	Employee self-directed development options	Vendor delivery capabilities / scalability	
	Evolving business unit needs	Just in time training / flexibility	
	Growth through acquisition	Global by nature	
	Leadership capabilities model	Vendor aligned with performance management cycle	
	Operating principles / corporate culture / mission	Vendor aligned with leadership behaviors to drive growth and reflect the way PB approaches work	
	Training administration	Overhead containment	
10 = Least Important			




## *Analyze Current Situation: Your Environment*

List the current issues or problems you are experiencing with your current situation. What is the potential business impact to the business and / or the training organization associated with the problem? List the corresponding impact of each issue or problem on the right.

Current Issue / Problem	Business Impact

## *Decision Criteria Mapping and Ranking: Your Environment*

Analyze the current state of your operation and identify opportunities to improve your responsiveness to the business units and the employee population. List the impact to the business as a result of your current situation and the business drivers you see as a result of corporate initiatives in the left column. Identify your decision criteria to the corresponding business Impact / driver in the middle column. Then rank the decision criteria in order of importance as you see them in the right column. (1 as the most important, and 8 as the least important)

	Business Impact / Drivers	Decision Criteria	Importance
<div style="text-align: center;"> <p><b>1 = Most Important</b></p>  <p><b>8 = Least Important</b></p> </div>			

## Vendor Partnership Evaluation

The checklist below includes suggested guidelines for vendor selection. You may choose to reorder the steps to your preferred sequence. Add any additional milestones in the blank spaces provided.

Provider / Program Name \_\_\_\_\_ Date \_\_\_\_\_

Rating Scale: 5 = excellent, 4 = very good, 3 = good, 2 = fair, 1 = poor Final rating \_\_\_\_\_

Milestones	Rating	Comments
<input type="checkbox"/> Capabilities presentation and overview		
<input type="checkbox"/> Meet subject matter experts: program leaders / instructors		
<input type="checkbox"/> Audit program(s)		
<input type="checkbox"/> Pilot program		
<input type="checkbox"/> Reference check		
<input type="checkbox"/> Evaluate process definition and transparency		
<input type="checkbox"/> Identify problem / issue resolution process		
<input type="checkbox"/> Partner has demonstrated their management's support of the partnership		
<input type="checkbox"/> Confidence in relationship and ongoing support		
<input type="checkbox"/> Meets identified decision criteria		
<input type="checkbox"/> Conforms to budget requirements		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

## Implementation and Program Management Checklist

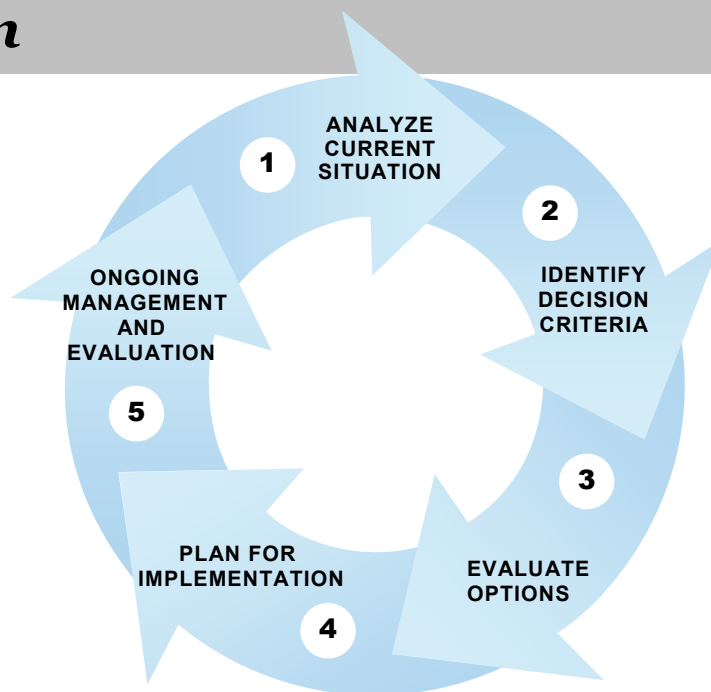
The checklist below includes suggested guidelines for successful program implementation and ongoing management of the partnership and programs. Add any additional process steps applicable to your environment in the blank spaces provided.



Provider / Program Name \_\_\_\_\_ Date \_\_\_\_\_

Implementation	Comments
<input type="checkbox"/> Kick off meeting to align priorities and key action items	
<input type="checkbox"/> Define measures of success: participant attendance, feedback, locations	
<input type="checkbox"/> Coordination of program offering with training partner, locations, instructors, titles	
<input type="checkbox"/> Identify available marketing and communication support from training partner	
<input type="checkbox"/> Obtain senior executive communication for release to employee population	
<input type="checkbox"/> Educate employee population as to available learning opportunities	
<input type="checkbox"/> Schedule Instructor orientations	
<input type="checkbox"/>	
<input type="checkbox"/>	
Ongoing Management and Evaluation	Comments
<input type="checkbox"/> Collect and summarize data for measures of success	
<input type="checkbox"/> Ongoing communication and review	
<input type="checkbox"/> Leverage opportunities to realign solution due to changing priorities	
<input type="checkbox"/>	
<input type="checkbox"/>	



# Action Plan



	<p><b>Analyze current situation</b> – What are the issues or challenges with the current situation? What directives are important to senior management and how can they be supported?</p>
	<p><b>Identify decision criteria</b> – What is the criteria based upon business issues and drivers? How are they ranked in order of importance?</p>



**Evaluate options** – How do the options compare to the identified needs and criteria?



**Plan for implementation** – How can performance measures and process ensure flawless execution?



**Ongoing management and evaluation** – How is success sustained and new opportunities for improvement leveraged?

## *Co-Facilitators*

**Derek Hann** has over fifteen years of increasingly responsible positions in HR client management, corporate organizational development, and professional leadership education as a Human Resources business partner. He has a proven track record of delivering operational effectiveness, implementing sustained change activities, aligning HR goals with business imperatives, building relationships with colleagues and clients, and targeting the skill development of professionals throughout large-scale organizations. He has deep talent management knowledge, and the ability to lead Recruiting, Diversity, and Training functions, including creating divisional strategic perspectives.

At Pitney Bowes, he is a Director-level leader of the Strategic Talent Management Team. In his role, he develops and implements the global leadership training strategy, curricula, policies, and practices to ensure that Pitney Bowes leaders have access to and participate in state-of-the-art leadership programs. He partners with leadership development professionals and key stakeholders to identify and spearhead leadership-training programs. He supports Business Unit Relationship Leaders in the implementation of enterprise-wide leadership training initiatives.

At the General Electric Company, as GE's Corporate Leadership Development Operations Manager, he provided global leadership and direction in the design and implementation of consistent, integrated "best in class" strategies, processes and tools in the areas of early-career leadership development, talent management, and performance management. He facilitated the achievement of pipeline-fulfillment goals and objectives through delivery of the global Leadership Development Programs. He supported other leadership colleagues in establishing the vision, strategic imperatives, and operational priorities to provide a clear frame of reference for the successful management and accomplishment of work programs and activities.

**Lisa Zoba** is a Regional Director with the American Management Association (AMA), a global not-for-profit, membership-based association that provides a full range of management development and educational services. Lisa brings more than fifteen years of experience which encompasses training, management and business development roles and includes both operational and strategic positions. As Regional Director with AMA, Lisa is responsible for the development of client relationships in the New York metro area. Her approach is to work with clients to understand their business needs, and bring AMA's breadth and depth of resources and capabilities to help them to achieve organizational objectives, and desired results.

At ExecuTrain, a technology-training firm, Lisa joined as Regional Training Director. She was responsible for the strategic direction and overall management of the training function for the Northeast region. She developed and implemented processes and procedures in operations, course customization capability and talent management, which brought greater alignment between training and sales functions and enhanced responsiveness and quality solutions to clients.

At Canon USA, Lisa held positions of increasing responsibility as Sales Trainer, Senior Trainer, Sales Training Manager, and National Service Training Manager. She managed all phases of the training and development process including development of training initiatives to support new product launches, and integration of leading edge skills and knowledge to maximize Canon's competitive position in the marketplace. These efforts positively impacted the quality of program offerings and provided skill development opportunities for a national network of over 5000 dealer sales and service personnel in furtherance of corporate goals.