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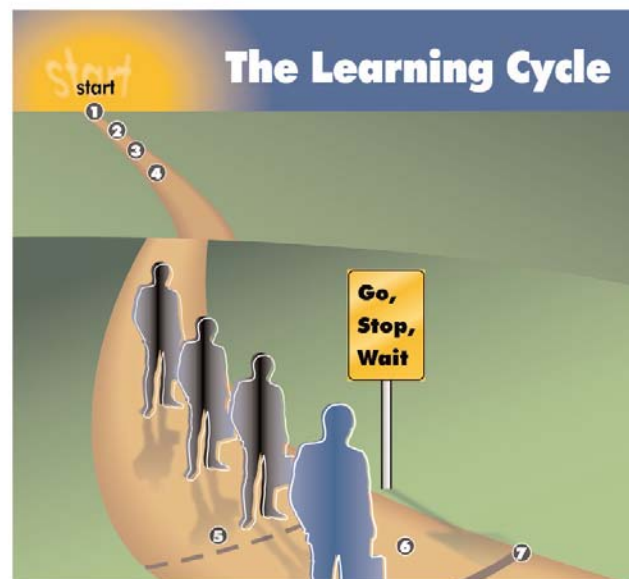
BATON-PASSING: Building a Just-in-Time, Cross-Team Learning Approach

A face-to-face sharing of experience is far more effective than archiving "learnings" that no one will ever use.

Victor Newman

Baton-Passing is a knowledge management technique that enhances the results of a team facing a project milestone. The technique captures the freshest knowledge from a product team that has just gone through a major decision milestone and rapidly transfers it in real time to a new team about to begin the run-up to a similar decision milestone. Unusual features of the technique are the way it integrates knowledge management, innovation politics and team psychology. Since Baton-Passing is now moving outside the pharmaceutical industry into legal and financial services, I want to share some of the background thinking that led to its recent form while outlining the technique.

A few years ago, I was invited to review the output of a team learnings exercise with a successful product team in a global packaging business that had just taken a new product to market. The exercise was conducted over three days. With a triumphant flourish, the facilitator pointed to the filled out forms around the walls and shared the wonderful learning metric that 192 learnings had been successfully documented from this team. My face went white in shock at the futility of this exercise. Clearly, the facilitator was under the impression that the more lessons documented the better things were. Naturally, the next step was to embalm the 192 documented learnings along with their four thousand fellows in the



- 1 Diagnostic Instrument Interview (15/18 months before Review)
- 2 Foundation Process Orientation
- 3 Team Deliverables Review
- 4 Recipient/Donor Teams @ 1st Baton-Passing Learnings Meeting
- 5 Project Deliverables Milestone Review
- 6 Donor/Recipient Teams @ 2nd Baton-Passing Learnings Meeting (max +3 months)
- 7 Active review of Lifesavers and Action Learnings to engineer learning into deliverables and build key education packages

0.1

Documented, generic Time to Market Process with defined key-stage decision gates, each supported by...

0.2

Defined deliverables and success-criteria around ROI, viability and process capability

learnings database, where they were likely to stay. When I subsequently reviewed the Learnings Database I discovered that certain key lessons had been "learned" up to eight times by different teams.

To me, documenting learnings is only part of a bigger, more effective solution that means understanding the limitations of the computer and how teams think and behave under pressure. I decided that it was time to take a different course, and to improve upon an approach I had prototyped on a high-fliers' strategic change program. The problem with the traditional approach to KM, which is to document everything, is that it ignores what we know about how we think, change management, and the psychology of product teams. If we review what we know about how managers think, managers tend to:

- Make decisions on incomplete data, even when additional data is available
- Use experience to interpret problems, ignoring later data even when presented
- Solve the next problem that appears, as it appears, instead of visualizing all the problems within a sequence that ends in completion and anticipating them

My experience with the teams that take products to market taught me that they tend to share certain idiosyncrasies which might usefully be combined under the heading of a "Heroic Martyr Culture". Attitudes like these prevent new teams from even consulting a knowledge base developed by others:

Initial insane confidence and independence: Teams often start off feeling they don't need anyone else's "wheel" or process methodology, and that there's nothing they could possibly find useful in someone else's experience. Specialists tend to believe in the uniqueness of their project and that they couldn't make the mistakes that others made. They argue that "our project" is different. The further away the decision-making milestone that will decide whether to continue investment or close a project down, the less concerned about necessary detail the project manager will be.

Hell is for Heroes: nothing that is innovative can be achieved without creating hell for everyone involved, and some chaos and conflict is inevitable. In fact don't team diagnostics and development models suggest that this is normal and acceptable?

Theatre of Blood, or Investment Decision-Making gets Personal: Conflict between Governance (senior technical decision-makers) as gatekeepers on investment decisions and team experts is traditional. It is often said that Governance used to know what they were doing before they got too senior, whilst team specialists actually do know what they are doing but may not be allowed to educate Governance. The conflict may even be a healthy part of the ritual posturing of management through posing awkward questions. It is part of

teams' job to be passionate advocates of their project, and for Governance to be negative and ask difficult questions.

Been there, done that: Having taken a project to a key decision milestone is a symbolic, career-enhancing ticket punch. In some organizations, if you've negotiated all of the above and survived, perhaps even with the additional cachet of having been part of a project that actually made it to market, you never get asked to do it again. This makes for steady leakage and decay of potentially useful knowledge that remains tacit.

Taking all of the above together, from the way we tend to think, to the components of the Heroic Martyr Syndrome of project managers and their teams, it becomes clear that we have all the potential for a self-reinforcing cycle of incompetence, with the potential to ensure that project progression remains problematical with repetitive cycles of accidentally engineered crisis.

Breaking the cycle

I began to design an approach that has the following characteristics:

- Fast and dynamic: under 3 hours
- Visual and intuitive
- Knowledge building as opposed to knowledge sharing
- Involving those with hunger and those with something to share in building something new
- Active engagement of those who know, and those who want to know
- Documented commitment to specific outcomes

The Baton-Passing technique involves a meeting that lasts a bit under three hours, where the timing of the desire to learn of the recipient team (the one moving toward a decision milestone) and the desire to impart the experience of a donor team is coordinated. As I have said elsewhere, the value of knowledge is like the value of fruit: its value is determined by connecting the timing of the fruit's ripening with the emerging hunger of its potential customers.

The hunger of the recipient team is engaged by three events that cumulatively build interest, and is supported by a clear definition of necessary deliverables and success criteria for the decision milestone (usually product profile, process capability, market analysis and ROI). The first event is a structured interview with the project manager. During this interview the project manager is alerted to the nature of deliverables that will have to be satisfied at the decision milestone and to the sources of information available to prepare the team to succeed at this meeting. The second event is a 45-minute process overview to the core team of the generic route and steps that will have to be negotiated to satisfy Governance. The third event is a three-hour workshop with a

traffic-lights review (go, wait, stop) of milestone deliverables and confidence-levels, followed by a dependency-mapping exercise identifying key dependencies that trigger resource commitments.

By this time, the core team understands where they are going, what it is going to take, and has begun to formulate their own questions about knowledge and capability gaps and confidence levels around deliverables. And the clock is running. The optimal timing for the Baton-Passing meeting varies with different industrial sectors, but my experience so far shows a variability of between 18 and 15 months ahead of the approaching decision milestone for preparing the incoming, recipient project team, and a suggested useful post-decision milestone knowledge decay time limit of no more than 4 months. A longer time interval following negotiation of the decision milestone for a potential donor can lead to some constructive fantasy or finger-pointing groupthink in the knowledge being passed. This is especially true for failed projects, where even careful replaying of the experience through a Highs and Lows Timeline Definition exercise won't reflect useful reality. So planning the timing to maximize the potential value of the Baton-Passing event is key.



The Baton-Passing Meeting

The 3-hour Baton-Passing meeting itself involves the use of "Creative Silence Brainstorming" to generate learnings from experienced donors and questions from novice recipient teams. If there is no shared generic time-to-market (T2M) process to provide the context for positioning and mediating the learnings and questions, this has to be constructed prior to the event and is usually captured on a large roll of brown paper, with specifically-named, top-level process stages above the minor activities that define them. This provides the process context for documenting the Baton-Passing meeting.

The donor and recipient teams concurrently brainstorm their

respective key learnings and questions and locate these on the generic T2M process using color-coded Post-it notes. Each key stage within the T2M process is then reviewed to check understanding of questions and learnings. Relevant learnings are connected to key questions, and then gaps in the form of questions without associated learnings and also learnings without questions are reviewed and resolved. One of the key behaviors in the Baton-Passing method is to encourage recipients with questions to insist upon the restatement of connected and prototype learnings (invented on the spot to answer a new question) until the recipient who posed the question believes they understand the answer from the donor team.

The final stage of the meeting is to transfer the Post-its onto two Baton-Passing templates. The first template is a single full-page sheet called the "Front-Page Lifesaver". This allocates specific high-priority learnings to each top-level, process stage and acts as an *aide-memoire* for the team. The second template is the "Action Learnings" drill-down that works through each top-level process stage as though they were chapters in a book, presenting the minor activities that define them, then working through all learnings to match them against specific thematic questions. These are then reviewed by the recipient team against their own project for relevance, and then specific individuals within the recipient team commit to delivering the learning against a specific timeline. This is then sometimes repackaged to show individual commitments on a timeline for all the deliverables.

Classic outcomes from Baton-Passing include:

- Active redefinition of success criteria for future milestone decision meetings
- Shorter milestone decision meetings dealing with exceptions rather than agreed deliverables
- Pre-negotiation of ambiguous deliverables with key stakeholders prior to milestone decision-making meeting
- Partnering of specialists from outgoing and incoming teams. It is very useful to have a partner to work with on ideas and problems before bringing them to the team
- Reduction of excessive product and customer testing, better focused investment in product trials
- Earlier closure of projects that cannot meet the specification, and redeployment of resources onto the next wave of prototypes
- Better joint-venture projects through greater clarity on outcomes
- Faster time to market, with reductions of up to 24% recorded on several projects
- Serious reduction in rework due to clarity on experimental design from the outset
- Smarter project management leadership of projects, with fewer project managers going it alone, and more managing to stay in the process "helicopter"

As I said in *The Knowledge Activist's Handbook*, "Knowledge Management is the deliberate management of knowledge to deliver specific outcomes". Baton-Passing, although it is still evolving, is a powerful answer to the fundamental question about the value of managing knowledge. While the knowledge in people's heads has the potential to deliver innovation, it is the ability to mobilize that knowledge into new products and services that delivers a company's necessary return on investment. The key outcomes that matter are getting to market earlier through the making of better, more

timely decisions that make optimum use of limited people, time and money resources. And with Baton-Passing, we know how to do it.

Victor Newman is the former Chief Learning Officer of the European Pfizer Research University and Visiting Professor in Knowledge Management and Innovation to the Open University Business School. He is the author of The Knowledge Activist's Handbook: Adventures from the Knowledge Trenches (December 2002, Capstone). His consulting email is knowledgeworks@aol.com.

Lessons to Take Home: Benchmarking Learning at Caterpillar

The company known for earth-moving discovers how to move itself

Marcia Dresner

When everyone at all levels of an organization understands the importance of learning, the stage is set for an exciting transformation. That's just what Caterpillar described during September's benchmarking event at the Hotel Père Marquette in Peoria, IL. The story they told about the evolution of corporate learning and its role in building the company's success was compelling. The company's willingness to discuss the triumphs and trials on the way to that success from many perspectives led to many spirited exchanges with an engaged and eager audience.

Dave Vance, the head of Caterpillar University, started the first day's events with a description of the three-year old organization, developed as part of an overall vision to create a corporate-wide learning culture. He described how their planning process assures alignment of learning with the goals of the business, and their detailed processes for measurement and evaluation.

Jerry Palmer, Vice President, Wheel Loaders & Excavation Division, then described the function and make-up of Caterpillar University's Governing Board. He was eloquent in describing the commitment of senior management to the long-term success of Cat U and their enthusiasm for its accomplishments, even as he described the lessons learned and challenges faced.

Breakout sessions featured the work of specific colleges within Caterpillar University - Leadership, Marketing & Distribution, Business & Business Processes, Six Sigma and Technology - along with a session on technology-enabled

learning and the award-winning knowledge management system based on communities of practice.

Shirley Streib, Learning Manager, Motion and Power Control Division, described a "typical" day for a Lead Learning Manager (bottom line - it involves lots of juggling!). Fred Goh, Performance Improvement Manager, described the development of enterprise learning plans, how they relate to individual development, and what challenges they still face. The first day concluded with questions and answers for a panel of Cat U deans, Lead Learning Managers, and Shared Services Regional Center Managers.

On Friday, Sheela Mierson of Creative Learning Solutions, and Kevin Freiart, Global Learning Practice Leader for the Learning & OD group, Pfizer, treated the group to a hands-on demonstration of Problem-based Learning (described in the last issue of *Corporate University International*), a technique for increasing team performance, an important issue for today's project-

based corporate environment. This was followed by Ed Trolley of Knowledge Planet speaking about "Running Training as a Business" and Sue Todd, of CUX, speaking about findings from the Corporate University Xchange Sixth Annual Benchmarking Report.



The author is a Senior Researcher and Editor for Corporate University Xchange. She is a writer, editor and researcher with expertise in human resources, business, technology, and even chemistry. She can be reached at mdresner@corpu.com.

AHA Moments

Surprises from the Corporate University Xchange Sixth Annual Benchmarking Report

Marcia Dresner

"That's interesting", we said to ourselves over and over as we looked at the 800 pages of tabulated survey data that was to become the Corporate University Xchange Sixth Annual Benchmarking Report. Why are these 170 corporate universities doing things this way, or why aren't they doing that? Even with 180 pages and over a hundred figures and tables to tell the story, we couldn't cover everything. Here are some findings that we found intriguing, primarily because they seem to be areas that beg for more research to find out what's really going on.

Question: How does your corporate university ensure that its internal clients' business needs drive all learning activities?

Deciding what should be taught to create value in a business context is critical to corporate university success, and 81 percent of our survey group partner with line business managers to assess business needs and determine learning requirements, priorities, and measures of business success. How, we wonder, do the other 20 percent determine what has to be taught? As shown in Table 1, only one of the other methods in the survey garnered more than 50 percent, and two of these, conducting client relationship surveys and measurement are reactive rather than proactive. Are they other methods used by a significant number of corporate universities?

Table 1: Methods to ensure alignment

Partner with line business leaders to assess business needs and determine learning requirements, priorities, and measures of business success	81%
Measure corporate university contribution to helping achieve business goals	52%
Assign client relationship or account managers to key line businesses	41%
Conduct client relationship surveys after projects	40%
Assign performance consultants to work with businesses	36%
Assign corporate university staff members to work inside business units part-time	27%
Assign line business managers to work in corporate university on part-time or rotational basis	27%

Question: Which of the following people serve on your corporate university's main governing board?

The aha answer to this question was actually none-of-the-above: 34 percent of corporate universities do not have a formal governing board. This is true for 64 percent of all IT companies, 46 percent of companies spending between \$10 and 50 million on their CUs, and 43 percent of those in operation from 6-10 years. The governing board structure is used by 83 percent of government CUs, 85 percent of those spending more than \$50 million, 86 percent of companies with 5,000 to 10,000 employees and 81 percent of the largest companies - those with over 100,000 employees. Since the most-mentioned function of a governing board (83 percent) is to "identify and prioritize future organizational learning needs", the question has to be asked: how do CUs without governing boards address the long-term strategic issues of corporate learning?

Question: How important is capturing knowledge of senior people before they retire for your corporate university this year?

The pundits have conflicting views about whether there will be a shortage of skilled labor, but the inescapable fact is that a significant number of employees will reach retirement age in the next 5 years. When these people leave, the intellectual capital that they represent will be lost unless efforts are undertaken to preserve it in some fashion. Although almost half of corporate universities expect their chief learning officer to lead the overall Knowledge Management effort, only 15 percent of companies overall consider "Capturing Knowledge" a high priority (Table 2). Are there other efforts outside the CU to capture this knowledge, or is it something that just hasn't become a priority? Are there efforts underway to capture knowledge of people not classed as "senior people"?

Table 2: Capturing Knowledge

High importance	15%
Medium importance	24%
Low importance	35%
No importance	21%
Don't know	5%

Question: How many full-time equivalent (FTE) staff does your corporate university employ?

The overall average was 62 employees, and it wasn't much of a surprise when 91 percent of corporate universities in small companies (those with fewer than 1500 employees) said that they only had 1-10 full-time equivalent (FTE) staff. It was definitely a shock when 32 percent of companies with 100,000 or more employees gave that answer, with another 23 percent employing just 11-20 FTEs. That is a total of 55 percent - even higher than the 27 percent for the next smaller-size companies (Table 3). How do they accomplish this? Are they outsourcing everything? And, if so, why do 68 percent of companies overall think that "outsourcing more elements of corporate learning" is of little or no importance? Have they really done all they think they can or should?

**Table 3:
Full-time Equivalent Corporate University Staff**

FTEs	Overall	Under 1500	40,000 - 99,999	100,000 or more
1-10	43%	91%	18%	32%
11-20	15%	5%	9%	23%

Question: What level of responsibility does your corporate university have over succession planning and job rotations in your organization?

When 65 percent of all corporate universities cite "Implementing program to develop executives or high potential managers" as a high priority, and 70 percent of CUs have a role in Action Learning, it is surprising to find that so many CUs have little or no involvement in succession planning and job rotations (Table 4). Succession planning should inform the learning and development needs of future executives, and job rotations are an important aspect of the experiential side of learning. How can corporate universities increase their involvement with these?

Table 4: CU involvement in development

	Succession Planning	Job Rotations
Oversees most or all aspects	18%	8%
Sets direction and policy	21%	8%
No involvement	52%	68%
Not practiced in our organization	7%	14%
Don't know	3%	1%

Questions: At which of the following levels does your corporate university evaluate its learning programs? Please estimate the portion of corporate university programs evaluated at the following levels in the past year.

Measurement of learning has to be in terms that business leaders understand. When line-of-business leaders help determine learning priorities and measures, corporate universities can establish value in agreed-upon metrics at that level. But what about over-all impact in the financial terms that matter to executives? We were surprised to discover that, although 81 percent of learning is evaluated at Kirkpatrick Level 1 (90 percent of companies use it for 90 percent of their programs), that number goes down to 13 percent for Level 4 (49 percent of companies for 26 percent of programs) and even lower to 6 percent for ROI (32 and 22). Yet, 72 percent of CUs track number of student classroom days, while 55 percent of CUs track e-learning course completions. What will it take for learning to be measured by the same yardsticks as other business units? Should it be?

These are just a few of the tantalizing tidbits that came out of the Sixth Annual. They raise issues that we intend to shed light on through continued research and analysis, and perhaps address as we prepare the question set for the next survey (see box below). In addition, there is wealth of data that we couldn't report due to space constraints and we welcome specific questions about benchmarks you might need based on age, stage of development, size of employee population, industry and others differentiators.

Marcia Dresner is a Senior Researcher and Editor for Corporate University Xchange, and served as Editor of the Corporate University Xchange Sixth Annual Benchmarking Report. She can be reached at mdresner@corpu.com.

**HELP US GET READY FOR THE
"SEVENTH"**

We are currently looking for corporate university leaders willing to help us frame the survey for the next iteration of the benchmarking effort. We would like diverse representation so that the survey will reflect the needs of corporate universities large and small, global and non-global, new and old, etc. If you have any suggestions, or would be willing to help, please contact Marcia Dresner at mdresner@corpu.com.

FedEx Ground University: Culture Shift Brings Leadership Front and Center

Kristine Ellis

"Without our people, we have no service culture; they are our most important asset," said Steve Handy, Senior VP of Operations, Planning and Engineering/CLO, FedEx Ground, Pittsburgh.

That belief has long been the foundation of the learning strategy at FedEx Ground (FXG) and helped the company build a brand that stands for unequivocally reliable service. But by the end of the 1990s, years of rapid growth had made it increasingly difficult for the Pittsburgh-based company to find internal candidates equipped to lead in times of change.

In the face of a looming crisis, FXG shifted its learning culture. The company had been focused on developing technical and tactical competencies. Under its new focus, leadership development is front and center, driven by a series of competency-based leadership development programs under the umbrella of the FedEx Ground University.

"FXG University was developed to provide potential leaders with innovative experiences and lifelong development opportunities, both in and out of the classroom," said Handy.

FXG University includes two colleges. The Operations College, which began in 1996 and was brought into the university when it was launched in 2000, educates front-line managers on operational basics. The Leadership College, launched in 2001, helps all levels of management master the leadership competencies. Combined, the two colleges create a framework for delivering the right learning opportunities to the right employees at the right time.

The Leadership Basics

FXG's leadership development begins with Leadership Principles 1 (LP1). This two-week classroom experience introduces managers to the concepts of understanding self, leading others and managing the system. Structured actions such as simulations and role-plays are combined with problem solving, group discussion and other unstructured activities. Because many participants are in their first managerial position, week two of LP1 is spent learning basic management skills, including improving work habits, providing and receiving feedback, conducting company-specific meetings and managing conflict.

Each day throughout the two weeks, participants are given time to create a journal that details areas that they would like to continue to develop. At the end of the training, participants turn these items into a development plan that is forwarded to their managers and the Human Resources manager. Managers are encouraged to meet with the LP1 participants following



training to help them implement their action items.

Once managers are promoted to the next level of responsibility, they participate in a one-week LP2 course that builds on the principles they were introduced to in LP1. In addition, participants are introduced to the concepts of development planning, career coaching and multi-rater assessment.

Both basic courses are taught by leadership preceptors—midlevel managers with experience running a facility, extensive technical and leadership training, and a proven track record of performance. Leadership preceptors are nominated for the rotational assignment with the Leadership College by a corporate officer. After 24 to 30 months, the preceptors return to the field, often with a promotion.

Targeting High Performers

The next step in leadership development centers on the Web-based Developing High Performers (DHP) program. An annual cycle, DHP consists of three phases:

- **Assessment:** In this phase, participants complete four evaluations to determine their proficiency in the core leadership competencies.
- **Planning:** Participants begin this phase by identifying the competencies in which they have the most opportunity for development. They then select the tools and activities they will use to facilitate their development; these will serve as the basis for their system-hosted development plan. Participants then review this development plan with their managers and set timeframes for completion.
- **Development:** In this phase, participants implement their development plan with the help of coaching from their managers and online tracking and reminder mechanisms.

Managers take part in DHP each year until they are promoted to the next level.

Executive Leadership

The last phase of FXG's integrated leadership development approach is its Executive Leadership Institute (ELI), a year-long program designed to build senior managers' strategic leadership skills in preparation for an executive position within the company.

ELI participants are nominated by FXG's senior executives, each of whom serves as an executive mentor for one of the participants. Among ELI's many development opportunities are executive coaching and an experiential leadership development event in which participants spend time in a wilderness location working together to resolve specific out-

the highest ethical and professional standards.

"As a result of that team's work, we've revised our code of business conduct and ethics among other things, and we've developed training around the issue," said D'Alesandro.

Top Support, Local Input

FXG's executive management committee serves as FXG University's governing committee.

"We commissioned the university with the caveat that I would report to the executive management committee at least once a quarter, but we are on the agenda much more often than that," said Handy.

There is also a university steering committee that meets monthly via a Web conference that is comprised of Handy, an operations division vice president, university staff and representation from each of the primary region functions within field operations.

"Each month we invite some of the directors from the field as well as some of the regional staff to review current priorities, initiatives and so on. That has been a successful way to get buy-in and establish priorities at the operative level," Handy added.

Also key has been the organizational linkage between learning and operations. By giving Handy, whose other hat is operations and engineering, the CLO title, the executive team demonstrated its determination that training and development would be aligned with business goals.

To date, the committee has been well pleased with the university's performance and has supported it with annual budget increases every year since its inception. In 2003-2004 alone, FXG's senior executives increased the university's budget by 39 percent versus previous year's actual expenditures.

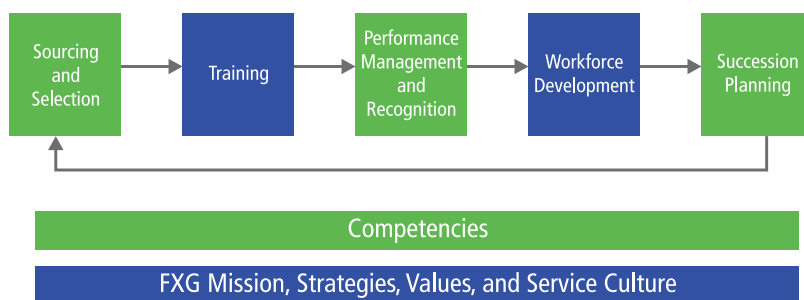
"Ninety percent of those served by the university are in the field. Their very positive feedback, that they are getting what they need, has made it possible for us to increase our programs and our expenditures," Handy said.

New Initiatives

One of the new items in the budget is the Competency Management Initiative launched in 2004 as the first phase of an enterprise undertaking. Building on the core leadership competencies, this effort identified competencies for every job family within the organization.

"In the past, we just gave people the definition of the competencies, but now we are able to give them the definition,

Integrating HR and FXGU Based on Competencies



FedEx
Ground

- = Human Resources
- = FXG University
- = Shared Ownership



door challenges.

ELI culminates in a business-related project (BRP). BRPs typically address current strategic business issues and are sponsored by one or two FXG executive officers. Each ELI team is responsible for researching the problem and presenting its recommendations to the executive management committee.

"The committee sets the stage for these projects and works closely with each ELI team," explained Heather D'Alesandro, managing director of FXG University. "As a result, several of the projects have resulted in initiatives that have been implemented." For example, a 2003 BRP team focused on ethics to determine how FXG could ensure that it was operating with

positive and negative indicators, rating scales...so individuals will know what behaviors are expected and those reviewing them can more objectively evaluate them, which enhances accountability," said D'Alesandro.

Over the next few years, the competencies will be integrated into sourcing and selection, performance management processes, training and development, and succession planning.

"Our officers come in and speak to specific topics so that participants can relate the theory they are learning to the reality of business," said D'Alesandro. "In the mini-MBA portion of our ELI program, which is 10 days long, we have had at least one or two officers participating each day."

Results

In addition to increasing its program offerings, FXG University's impact can be seen across the organization in other ways. For example:

- 57 percent of the company's service managers and 76 percent of their senior managers have completed LP1 to date.

- 204 participants are enrolled in DHP, and 96 percent of their managing directors are enrolled in or completed ELI.
- Overall improvement of scores in the seven leadership competencies introduced in LP1, LP2 and DHP. Results improved by 13.6 percent from 2002 to 2003.

While the figures illustrate that FXG is making the cultural shift to better prepare its leaders, even more is planned for the future.

"FedEx Ground has grown quickly, and it is important when you are developing people on the fast track that you have all of the programs and support mechanisms in place. We've accomplished a lot, but we still see the need to continue to improve—these programs are critical," Handy concluded.

Kristine Ellis is a business writer who frequently writes about learning and development issues.

The Corporate University Xchange Sixth Annual Benchmarking Report

Includes extensive tables and analysis of trends in learning and developing along with case studies. It is available from Corporate University Xchange for \$695.



To order a copy, please call 212-213-2828, send e-mail to: research@corpu.com, or visit the online bookstore at: <http://www.corpu.com/store/publications.asp>.



CLOs as Strategic Business Partners: The Corporate University Xchange 6th Annual Excellence and Innovation Celebration Event

The Corporate University Xchange 6th Annual Awards for Excellence and Innovation in Corporate Learning represent the “Academy Awards” in corporate learning. This year’s awards will be presented as part of a powerful, two-day program on January 17 – 18, 2005 at the Disney Yacht Club in Lake Buena Vista, Florida. The program features a keynote speech by General Jack Keane, a four star general and the chief operating officer of the United States Army, provocative panel discussions, and blockbuster presentations by the “best of the best” in learning and development.

Since 1999, the Corporate University Xchange Excellence and Innovation Awards have honored corporate and government organizations that set the standard for corporate learning in alignment, alliances, e-learning, marketing, measurement strategies, launching a corporate university or new learning initiative, and leadership development. Attendees at this year’s meeting will hear from the award winners in each category. In addition, the judges will be on hand to describe how they identified “excellence” in these programs and how they would expect programs to evolve in the next 2 to 3 years.

The Keynote Address

The meeting will open on Monday, January 17th, with a keynote address by General Jack Keane, a strategic thinker and creative problem solver who managed challenging and complex issues at the highest level within the Department of Defense. His speech on transformation management in a large complex organization will be based on his tenure as the Army’s Vice Chief of Staff during a period of unprecedented change. He will discuss the problems, challenges, successes, and failures associated with transforming one of the world’s largest organizations.

THE DETAILS

Who: Senior Executives in Corporate Learning who want to learn, discuss, challenge and celebrate.

What: CLOs as Strategic Business Partners: The Corporate University Xchange 6th Annual Excellence and Innovation Celebration Event

Where: Disney Yacht Club, 1700 EPCOT Resorts Boulevard, Lake Buena Vista, Florida, a world-class resort in the heart of one of the most exciting destinations in the United States. Call 407-934-3372 (not the main hotel number) to reserve your room. Ask for the Corporate University Xchange rate. There is a shuttle available from the airport to the hotel.

When: January 17-18, 2005 with Black Tie Awards Dinner January 17 starting at 6 PM. A welcome reception will be held in the evening of January 16.

How: To sign up for this event, please fax or e-mail the registration form (see next page) to Corporate University Xchange Events at 717-766-4459 or events@corpu.com by December 15, 2004.

How Much: The attendance fee is \$250 per person for members or \$895 per person for non-members including the black tie dinner. For those who wish to attend just the formal dinner banquet, there will be a fee of \$150. For group rates of 3 or more, or for more information about the event, please contact Events at 212-213-2828. Attendees are responsible for their own room charges (see above).

PANEL DISCUSSION

Helloooo CLO. Are Watchdogs Nipping At Your Feet? Are You Ready?

Governance continues to rise to the top of boardroom agendas and it's hard to know which industry will fall under the microscope next. Today's CLO must take responsibility for helping to build an ethical corporate culture. As a CLO, are you being responsive to this watershed issue? Are you driving the necessary culture change that ultimately may give your firm the opportunity to stay in business? Corporate University Xchange (CUX) will facilitate a provocative discussion among learning executives in the financial services industry (Bank One, CIBC, NY Life, Barclay's) to learn how their CLOs are making it through turbulent times managing governance issues.

PANEL DISCUSSION

"Low Carb" Learning and Development How to Cut the Fat Out of Your Programs

You can't spend two years selecting the right hammer when the goal is to build a house. But since technology came along, many learning and development professionals are afraid to pull the trigger on a system decision without an intense multi-year scrutiny of possible options. It's a just hammer, for pete's sake. And it's not just technology decisions. Learning professionals also get caught up taking orders for training. This panel discussion will dissect the issues that drive "fat" into learning and development and explore how to continually review offerings, program goals and methods to eliminate waste and deliver learning that impacts the business.

Award Presentations

It's rare when an audience is given insight into what went into the judge's decision when awards are given out. But that's what happening during the seven presentations – one for each award category – at this meeting. The award finalists will describe their organizations and the challenges they faced, and then describe the programs and practices for which they are being honored. Then the judges will describe what aspects of those programs and practices were considered noteworthy, and how they reflect the trends they are seeing in learning and development.

Learn from the award winners and a distinguished panel of judges that includes

Frank Anderson, President, Defense Acquisition University

Roger Schank, Chairman, Socratic Arts

Ed Trolley, VP of Outsourcing, KnowledgePlanet

Nick Van Dam, Global Chief Learning Officer, Deloitte Touche

Bridget O'Connor, Director, NYU

Randy Chase and Mark Mula, UBS Leadership Institute

Jerry Ewing and Andrew Zun, ATT

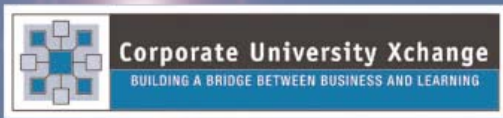
Bonnie Stauffer, Boeing

Ted Hoff, IBM Learning Center

Clark Aldrich, Simulearn

Corporate University Xchange events always attract senior level executives responsible for learning and development programs. Post-event surveys tell CUX again and again that attendees most enjoy presentations made by executives for executives. They like the focus on actual challenges and triumphs of their colleagues, and they enjoy the ample opportunities for exchange among colleagues. *Please join us!*





Yes No I am a member of the CLO Xchange

*The attendance fee is \$250 USD for CLO Xchange Members and \$895 for Non-members.
(includes sessions and black tie affair)*

Black Tie affair only - fee is \$150. (Group rates available)

Yes No I will attend the CLO Xchange Meeting on January 17th/18th
(includes Black Tie Awards Banquet).

Yes I will be attending the Black Tie Awards Dinner Only (January, 17th 6pm-10pm)

Name (please print): _____

Title: _____

Company Name: _____

Address: _____

City: _____ **State:** _____

Zip: _____

Phone: _____

Fax: _____

Email: _____

Signature: _____

Payment Details:

Credit Card (Circle One) AMEX Mastercard Visa

(\$100 cancellation fee)

CARD NUMBER: _____

EXPIRATION DATE: _____

Name as it appears on credit card: _____

Billing Address: _____

(For PO requirements, please call 212-213-2828)