

CAROL MANNING

Executive Vice President for Learning & Development at Lehman Brothers

by Gregory Lea



INTRODUCTION

Carol Manning is the Executive Vice President for Learning & Development at Lehman Brothers' Mortgage Capital Division (MCD). MCD is a collection of 10 companies operating independently under the ownership of Lehman Brothers. Carol is responsible for creating and implementing the global learning and development strategy across these 10 companies.

Prior to her work at Lehman Brothers, Carol was the Chief Learning Officer at both Rhythms Netconnection and Bay Networks. In all of these positions Carol molded the training department to fit her vision of learning and development in a corporate environment. Carol believes that a successful training department must add value to businesses it supports and it must align itself with the goals and initiatives of those businesses, creating an environment where the training department's goals and the business's goals are the same.

Carol has more than 25 years experience in corporate training and a Master's Degree in Education. She created what she calls the TAG process to more effectively implement instructional systems design into corporate training. TAG is an acronym for Training Advisory Group. In a nutshell, TAG creates a temporary group of stakeholders whose collective goal is to create and implement effective training. It works. I work for Carol at Aurora Loan Services, one of the companies that falls under the MCD umbrella. I decided to profile Carol because I have experienced the positive results of her system first hand and have learned and benefitted from her leadership.

OUR CONVERSATION

Greg Lea: How have you seen training evolve?

Carol Manning: Prior to Bay Networks I worked in sales at IBM. IBM put you through a lot of training which was mostly instructor-led with a lot of exams. You really had to prove yourself. It was arduous and not particularly engaging. First we saw it move from listening to a person talking to experiential. Then we saw the advent of not just cognitively listening, but doing things and breaking up the lecture with frequent lab exercises. Then, of course, was the advent of online learning where you could be anywhere anytime and if you needed a refresher you could take it again. And, it eliminated the cost of travel and expenses. It moved substantially from an old-school model into online whenever and wherever.

GL: All of this happened at IBM?

"It moved substantially from an old-school model into online whenever and wherever."

“Anytime you talk about cost savings you usually get your way.”

“When you get that linkage, that’s more radical than even the online side because now it is a business event and not just a training event.”

CM: No...at IBM it was mostly instructor-led. When I moved to Bay Networks in the mid 90’s and took over as the CLO, we quickly moved it online. We had to. We did a lot of international training and couldn’t fly back and forth easily, but still wanted to offer different types of training.

GL: Was this a case where the technology had finally caught up to the industry or that the industry just needed someone to bring that to them?

CM: The technology was there before most people adopted it. The trainers were threatened by it. The business wasn’t quite sure how they could use it. They thought it was expensive because you need not only the technology but also instructional designers. IT was already overwhelmed and didn’t really embrace it either. Those were three areas that you had to overcome.

GL: How did you overcome those challenges?

CM: Fortunately for me I had been given a mandate – fix training or you’re out of here. I said, “If you want to fix this you’re going to need some online training” and I talked about offsetting the cost with other savings such as reduced travel. Anytime you can talk about cost savings you usually get your way. I helped IT to understand that technology was an answer and that they could be front and center with this. I hired some instructional designers and we were off. Once you do a few courses and it’s successful, then you don’t have to build your case anymore.

GL: From a learning point of view, how do you think people benefit, or don’t benefit, from technology?

CM: It’s a two-edged sword. I think a lot of online training is not very well designed. It’s too boring and too long and people fake it. It can be, really, not effective at all. But, if it’s done well you can learn very quickly and we do see more people, especially Generation X and Y, who don’t want to sit in class. They want to get online and learn it for themselves. It’s way more flexible and scheduling is very easy. You can also do facilitated learning online which adds to that flexibility.

GL: Is that always true? Should all training be online?

CM: No...no. Some things you have to do in the classroom. Process training where you have to use your computer a lot can be done online, as simulated learning, but that’s pretty expensive and most of us don’t have that. Even then, online is not the answer to everything -- certainly not managerial and leadership training. I think you need to have role plays and other interactions. You can augment it with online training, but I think you need some hands-on activities.

GL: How do you decide if the training should be online or in the classroom?

CM: You have to figure out what the learner really needs to learn. I think the objectives tell you. I think the learners tell you.

GL: What trends have you seen outside of technology?

CM: I think what’s changed the most is the linkage of training to the business. If you get a really strong business advocate who is very involved, training does not really become an event. It is a business process and training is a piece of it. That’s very different than the idea that training owns these people for three hours, ship them over there and when they come back they’re supposed to know something. If training is integrated into the business process, then the business people will say, “Here’s our business, here’s why you need to know this. This is what we’re going to measure when you come back.” They sponsor the class and there’s also follow up and meaning behind it for the learner. When you get that linkage, that’s more radical than even the online side because now it is a business event and not just a training event.

“TAG is the ADDIE model, explained to business people.”

“Being rigid about using the TAG process saves you a lot of time, a lot of money and a lot of frustration.”

GL: What trends have you seen most recently?

CM: Webinars are now huge. I think they're even better than the [standard] online. You can record them and reuse them.

TAG, You're It!

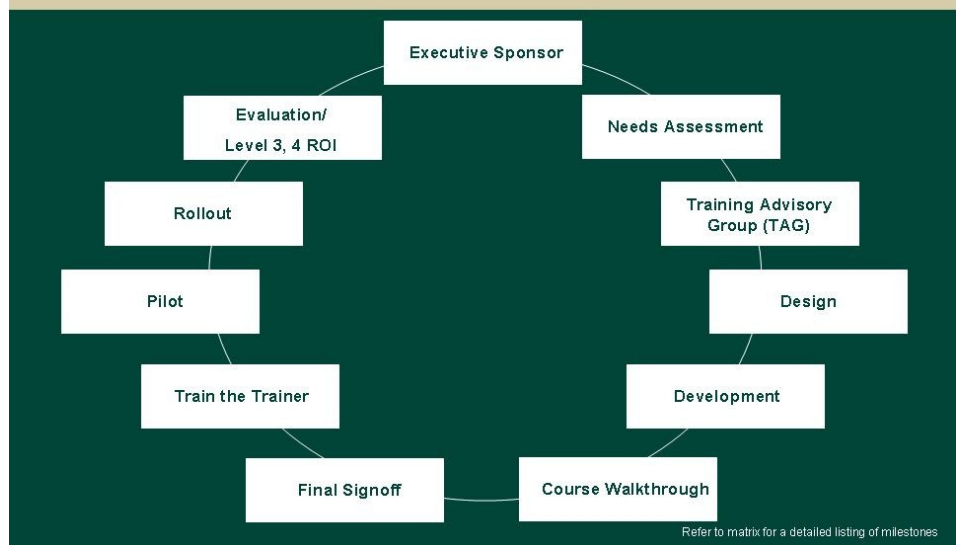
GL: How do you ensure success for training within a company?

CM: I force the alignment with the business group. Every new executive that comes in, I sit down and take them through the TAG process, so that they know and can talk about how we collaborate. We have quarterly report cards with the business to say, how is training doing and how we are doing?

GL: Tell me more about the TAG process.

CM: TAG is the ADDIE model, explained to business people. I don't like to use training jargon with the business because it's too confusing and they don't need to know it anyway. I created the TAG process years ago, to make sure the business people understand what we are trying to do. The value is that as the executive sponsor you get to help decide what the outcome of the training will be. We want you to name a few Subject Matter Experts, so that they know what we are trying to do. You come out of there [the TAG meeting] with an agreement of the priorities and scope of the project. And then the instructional designer will come back with a design document to say, OK business let me verify this, this is what we've agreed upon. Now you're negotiating to make sure that you're not wasting your time. If you jump into development before you've got design sign off, you may have a lot of time wasted on development that may never be used and people are frustrated because what they've developed is not useful. And the business people think that you've wasted a lot of time and you're not delivering as soon as you need to be. Being rigid about using the TAG process saves you a lot of time, a lot of money and a lot of frustration.

Learning and Development Process



“Be careful who you hire, and then everybody that you hire, be sure that they know coming in that this is the standard process.”

“If they don’t mention ADDIE, or analyzing needs, then I don’t have the right person.”

GL: How do you get your own department to buy into the TAG process? There’s a little more work involved and it seems that some might reject that.

CM: Everywhere I’ve been that’s an issue. With instructional designers and trainers, there’s always someone who wants to follow it and someone who wants to wing it. For managers I put it in their goals. Their goals have a line item that says you must follow the TAG process and all projects must use the TAG. They must make sure that their people follow through. I also put a lot of responsibility on the instructional designers to follow the process. Even if it is not a formal TAG, they still must follow the process. They have to sit down with the person requesting the training, talk through the process and create a design doc. If they don’t, I question the caliber of the instructional designer. I like to hire people who can demonstrate to me that they follow this process. If they don’t and they’re just winging it, I can tell by the material. You look at the material and they don’t have well stated objectives or the material doesn’t match the objectives, then I know they are not using the TAG process. So, be careful who you hire, and then everybody that you hire, be sure that they know coming in that this is the standard process.

GL: A job candidate may never have heard of the TAG process, but they still understand the basic principles. How do you evaluate a potential hire?

CM: The first question that I ask when I interview people for instructional design is, “When you’re working with the business, how do you decide what kind of training it is?” If they don’t mention ADDIE, or analyzing needs, then I don’t have the right person. The ADDIE model works fine. This TAG just allows business people to understand it better.

GL: How important is it that the TAG process is introduced early and at the executive level?

CM: I work with all of the CEOs *[at the 10 companies in MCD]*. If there is a training issue that comes out of an executive committee meeting, the CEO always gets to me. I am the first point *[of contact]* and I’m seen as their peer and somebody that is safe, that they can say to, “I don’t get this. How is it going to work? We need help.” That executive interface makes it easier on the team. Plus, if they are good, they can keep the team buffered from all of the politics. There’s a lot of politics in any company and it can be quite frustrating for a team. If you can keep them cocooned from that, that’s a good thing.

REFLECTION & CONCLUSION

Carol has helped to advance a shift in corporate training. Technology is a big part of this shift as it has become more capable and available, but I do not believe that technology is the catalyst for this shift. Instead it is awareness. Corporations are becoming more aware of the value of well-designed and well-implemented training and leaders like Carol are increasing that awareness by hiring personnel that are educated and experienced in the field of instructional design and technology. Linking training to the business as a functional and irreplaceable portion of the business process further increases awareness of training where it once may have been viewed as an external add-on with an unknown value. Carol developed the TAG process, which is a new approach to the ADDIE model that puts it in a context more familiar and acceptable to the corporate world. TAG further integrates the training process into the business process.

With a better training process and a more receptive training environment, tools like technology are more easily integrated into learning and development and can be seen as a valuable addition to the company infrastructure and one that is worth the expense. I think it is important not to lose sight of either “instructional design” or “technology.” Both will continue to increase in importance in the coming years, but “technology” really does not benefit training without the underlying “instructional design.”

Contact Carol Manning at:

carol.a.manning@gmail.com