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Profiling a New Breed of Learning Executive

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Abstract
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While chief learning officers are responsible for the professional educational development of millions of people, there is no school with a curriculum to prepare this group of powerful and influential individuals. Penn's business and education schools are joining forces to develop a credentialing program for CLOs.

Targeting newly appointed CLOs, experienced CLOs, and those aspiring to the position, the modular program will offer executive education and applied research opportunities—and may ultimately lead to a doctoral degree in education.

Focusing on business strategy and management, leadership, instructional design, technological integration, and problem solving, the program defines the path for a potential CLO, supports and develops the current CLO, and increases the public's understanding of this role.

Comments
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Profiling a New Breed of Learning Executive

The role of a CLO has changed in scope, but not in purpose.

By Brenda Sugrue and Doug Lynch

IN THE MID-1990s, when Jack Welch gave Steve Kerr the title of CLO, General Electric became the first company on record to have a learning executive with the title chief learning officer (CLO).

Since then, the title has become more popular, if not yet ubiquitous. Perhaps more importantly, it looks as if—regardless of the operating title—the role and responsibilities of the most senior learning executive in an organization have broadened in scope, though not in purpose since Jack Welch first coined the phrase with its implied emphasis on strategy.

In 2000, Timothy Baldwin and Camden Danielson published a report of their interviews with 10 of the first wave of CLOs in *Business Horizons*. Baldwin and Danielson identified similarities and differences among the 10 CLOs in terms of their charge, mission, priorities, key initiatives, and performance measures. They concluded that the role of the CLO was largely strategic, linking learning priorities and initiatives to the strategic direction of the firm. They reported increased pressure on these CLOs to produce tangible value from learning investments.

In June 2005, ASTD and the University of Pennsylvania partnered on a survey to find out more about the current CLO population. We received responses from 153 heads of learning, 92 of whom had learning budgets greater than $1 million in companies with more than 100 employees. We selected those 92 CLOs for analysis. Learning budgets ranged from $1 million to more than $100 million, the number of employees ranged from 100 to more than 50,000, and annual company revenue ranged from $10 million to more than $200 billion. Most companies were based in the United States, but many had operations in other regions of the world.

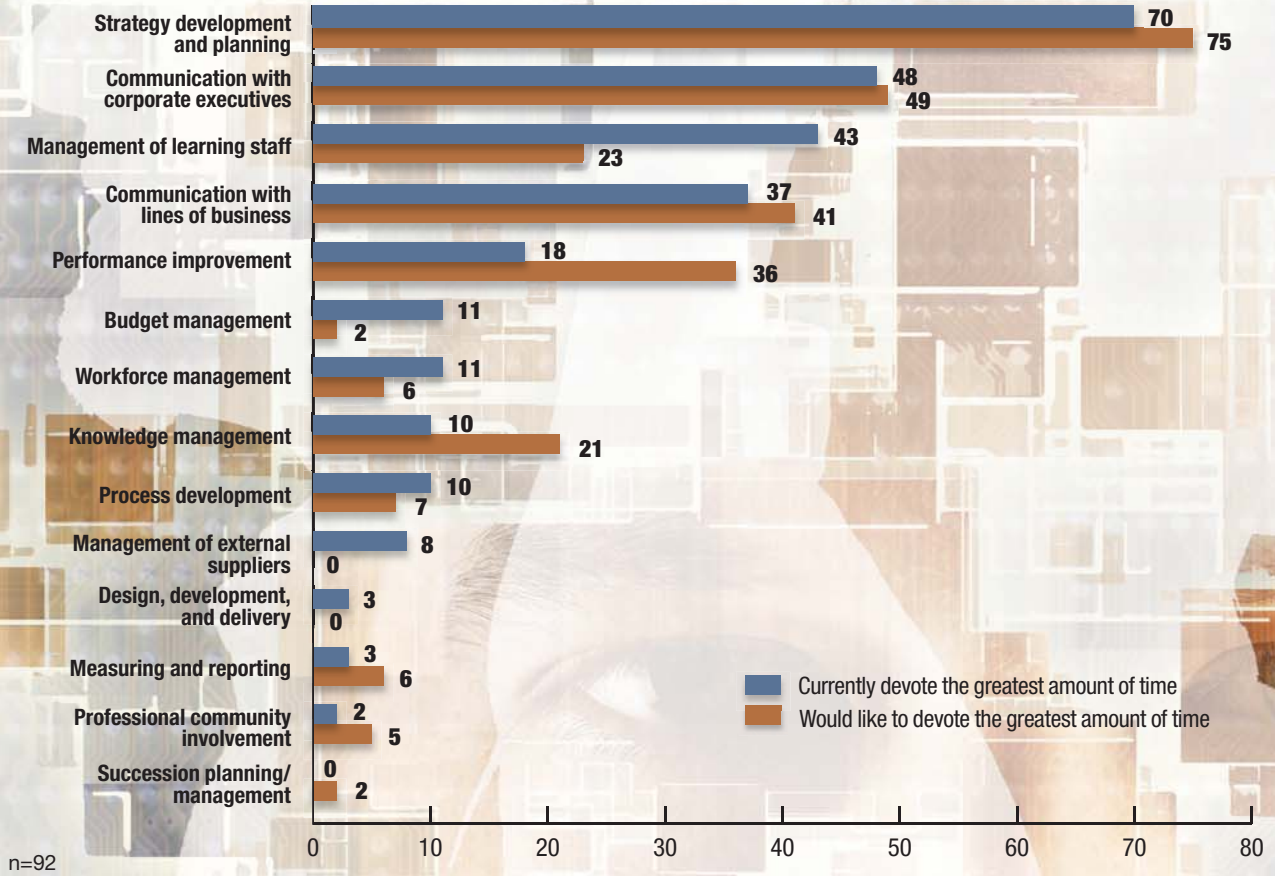
This article profiles the current positions, career histories, and educational backgrounds of the heads of learning in those 92 organizations. It also reports on the competencies these heads of learning believe to be critical for success.

Photo: Getty Images

See page 6 for an Executive Summary of this article

chart 1

Select the 3 job tasks to which you currently devote the greatest amount of time, and the 3 to which you would like to devote the greatest amount of time.



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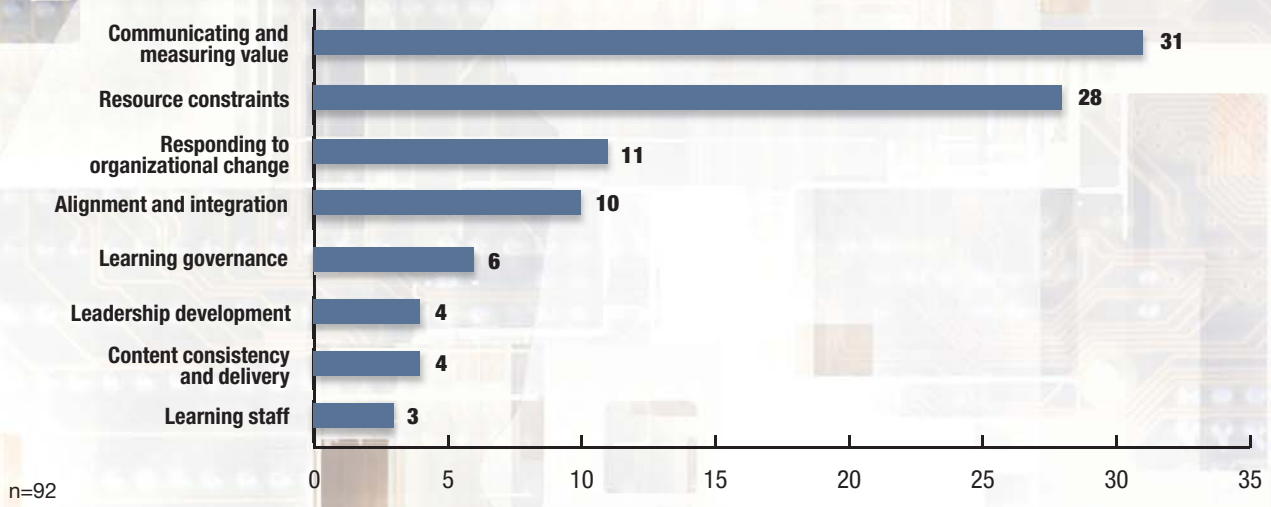
Source: ASTD/University of Pennsylvania Chief Learning Officer Profile Research Report, 2006

chart 2

Describe the number one challenge you face in your current position.



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Source: ASTD/University of Pennsylvania Chief Learning Officer Profile Research Report, 2006

Position and span of control

Fourteen percent of learning executives in our sample were using the CLO title. Almost 80 percent used either director or vice president of learning or training as their title. (Note: In this article, we refer to all 92 learning executives as CLOs, regardless of their official title.) Their average tenure in the position was five years. Sixty-five percent reported to the vice president or senior vice president of human resources. The rest (35 percent) reported to the CEO, chief operating officer, or another non-HR senior executive.

The average learning staff in those 92 organizations was 583, with a maximum of 6,000. In one third of respondents, the entire organization's learning staff reported to the CLO. In another third of those surveyed, less than 50 percent of the entire learning staff reported to the CLO, and in another third, more than 50 percent—but less than 100 percent—of the learning staff reported to the CLO. Similarly, in one third of cases, the CLO managed the entire learning budget, with approximately one third managing less than 50 percent, and another third managing more than 50 percent but less than 100 percent of the entire learning budget.

The elements of the learning function most often centralized were strategy, technology infrastructure, and content design and development. The elements most often decentralized were content delivery, performance improvement, and budgeting and planning. Fifty-eight percent (53 out of 92) of the organizations had a corporate university and half of those were virtual universities.

Prototypical CLO

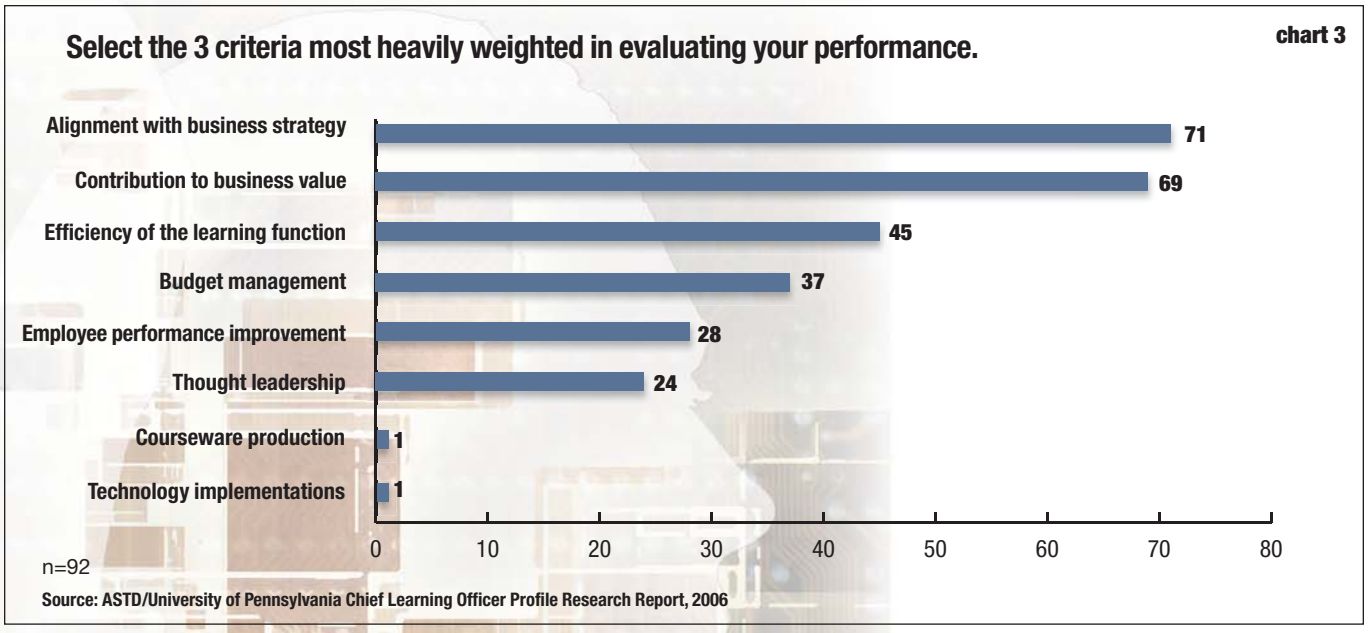
Age	89 percent over 40; 50 percent over 50
Gender	54 percent male; 46 percent female
Ethnicity	91 percent Caucasian
Years in position	5
Years with organization	10
Years in industry sector	13
Reports to	5 percent to head of HR; 35 percent to non-HR senior executive
Span of control	Direct control of at least 50 percent of all learning staff and budget; 58 percent run a corporate university
Primary job tasks	• strategy • planning • communication with executives and lines of business • management of learning staff
Evaluation criteria	• alignment with and contribution to business • efficiency/productivity of the learning function • career • combination of learning, human resources, organizational development, and business management • most previous experience in the learning field as training managers and instructors
Education	Master's degree (90 percent); doctorate (30 percent)
Areas of concentration:	business, social sciences, and psychology
Interest in further learning	• measurement and evaluation • human performance improvement • learning technology infrastructure • strategic planning
Greatest challenges	Communicating value, resource constraints
Recent accomplishments	Expanding the scope and reach of the learning function
Career aspiration	CLO in a larger organization

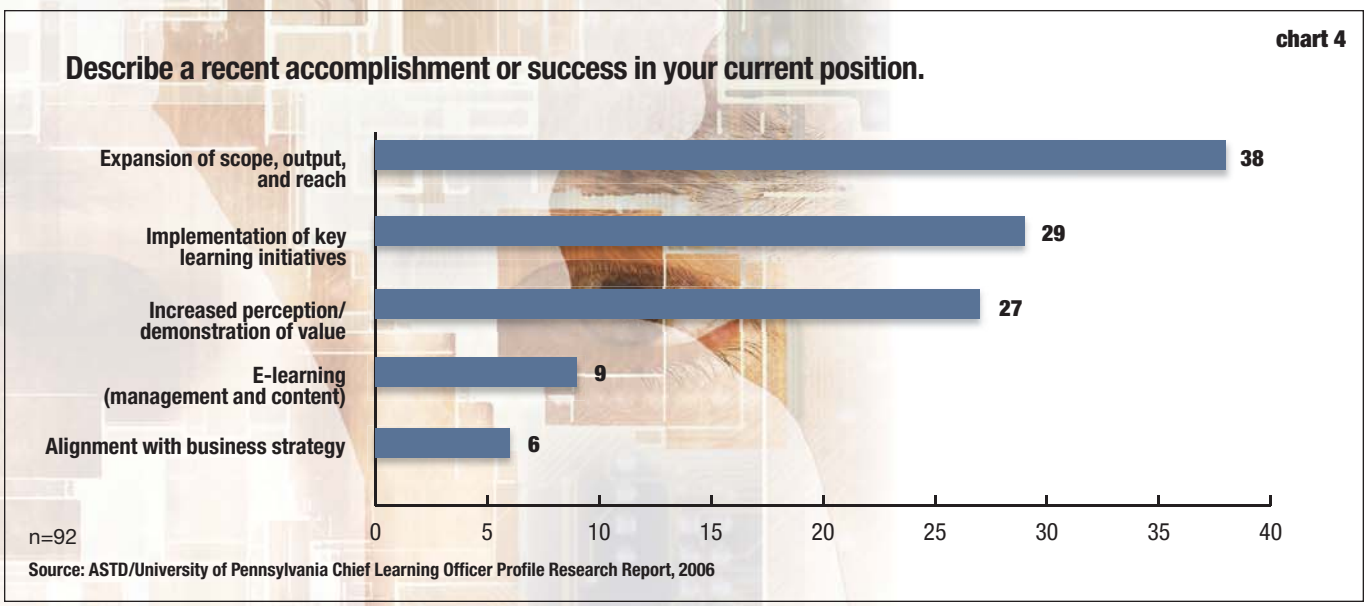
Tasks, challenges, and accomplishments

As shown in chart 1 on page 52, the job tasks on which CLOs reported spending most of their time were strategy development and planning, communication with corporate executives and lines of business, and management of learning staff. However, these CLOs indicated that they would like to spend less time managing learning staff and more time on performance improvement. They would also like to spend more time on knowledge management.

The challenge most frequently mentioned by this sample of CLOs was communicating and measuring the value of learning (see chart 2 on page 52). One CLO wrote, "My biggest challenge is convincing senior executives of the strategic value of learning." Another wrote, "The number one challenge we face is ensuring that we can achieve compelling clarity about the value we are delivering through learning, with effective measurements for all our learning initiatives."

Resource constraints were the second most frequently cited challenge for the CLO. One CLO wrote, "By far the number one challenge I face is budget. I work in an organization that has experienced three straight years of budget reductions even though demand for our products has risen dramatically." Another wrote, "The biggest challenge is meeting the growing demands on the learning organization as it becomes more core to the business without a corresponding increase in investment."





Other frequently mentioned challenges were responding to organizational changes such as globalization, and ensuring that learning is aligned with business goals and integrated with other aspects of HR and performance improvement.

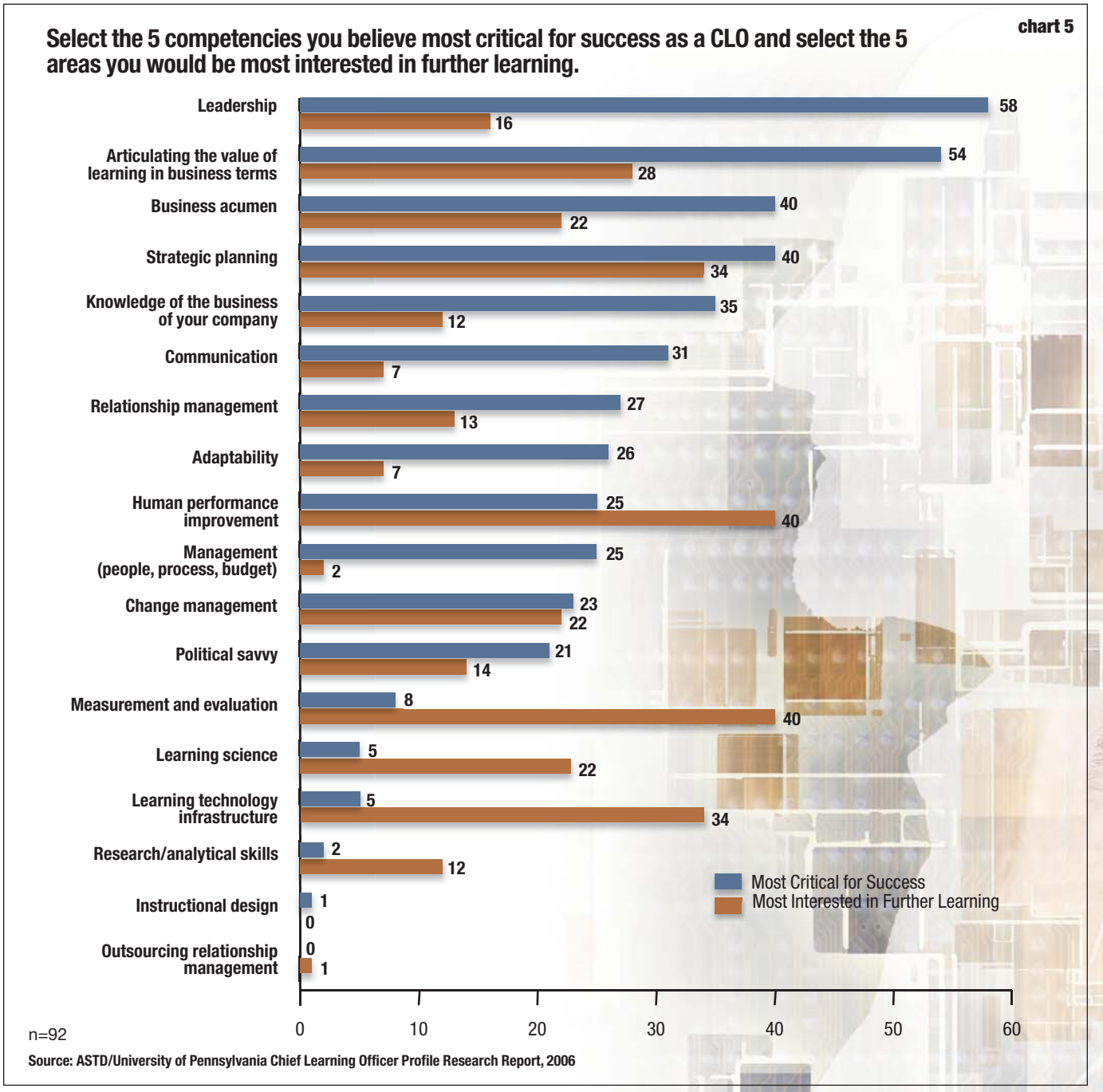
One CLO wrote, "My biggest challenge is being able to shift areas of focus in a very rapidly changing business environment." Another wrote, "The biggest challenge is helping the organization evolve into a multi-product line/multi-category business with all the concomitant change in leadership behavior and organization behavior."

The 92 CLOs reported that their performance was evaluated mostly based on alignment with business strategy, contribution to business value, and efficiency of the learning function (see chart 3 above).

When asked to describe a recent accomplishment, the most frequently mentioned accomplishment was an expansion of the scope, output, or reach of the learning function, such as creation of new programs, increased global audiences, talent management, and performance management (see chart 4 above).

One CLO wrote, "As a newly centralized university, we delivered twice as much training in 2005 as in 2004 at no additional cost to the company." Another wrote, "We combined and automated our performance management processes. We convinced the executive committee to commit additional staff and budget to position our group as an organizational effectiveness function to drive business value."

Other frequently mentioned accomplishments related to the implementation of key initiatives such as leadership development programs and increased perception and demonstration of the value of learning. One CLO wrote, "A recent accomplishment was seeing three years of stra-



tegic planning and design fully accepted by the company." Another wrote, "An ongoing accomplishment is earning the trust and respect of corporate and property leaders."

Career histories and aspirations

The average number of years the CLOs spent in their current organization was 10. The average number of years spent in the industry sector of their current organizations was 13. The job areas in which the largest number of CLOs had worked prior to their current positions were corporate learning, human resources, organizational development, and business management. The CLOs rated these areas as the most useful for their current positions.

An area where fewer had worked, but which had a high usefulness rating, was customer service. Areas where many had worked, but which had lower usefulness ratings were teaching in K-12 or higher education settings, and sales.

Within the learning field, the areas where CLOs had the most experience were training management and teaching, while project management and performance consulting were the areas with the second highest amount of experience. The next anticipated positions selected most frequently were CLO of a larger organization, vice president of HR, and consultant.

University of Pennsylvania Creates CLO Credentialing Track

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Educational background

Ninety percent of the CLOs in our sample had bachelor's degrees and 90 percent had master's degrees. Twenty-two percent had MBAs, and 14 percent had MEds. MBA and MEd were rated more useful than other master's degrees.

Thirty percent had doctorates (15 percent PhDs and 15 percent EdDs). The subject areas that they studied most in college were business, social sciences, and psychology. The subject areas they rated most useful were instructional technology, instructional design, organizational development, human resource development, and adult education.

Competencies for success

The competencies that the CLOs saw as most critical for success were leadership, articulating the value of learning in business terms, business acumen, and strategic planning (see chart 5 on page 55).

The areas in which they were most interested in further learning were measurement and evaluation, human performance improvement, strategic planning, and learning technology infrastructure. The areas where there were the greatest gaps between the competencies they think are critical and those they are interested in learning more about were leadership, measurement and evaluation, and learning technology infrastructure.

They see leadership as key to their success but are not interested in learning more about it. They see measurement and evaluation, and learning technology infrastructure as less critical to their success, but are very interested in learning more about them. This may be because they delegate responsibility for these two elements of the learning function to experts in those areas; however, having greater knowledge of these areas themselves might increase their confidence in the decisions they make in these areas.

Conclusion

The results of our survey indicate that the current role for CLOs is not dissimilar to that of the first CLO, Steve Kerr. Our results also echo those of Baldwin and Danielson's study of 10 of the first CLOs in the late 1990s.

In an interview published in the *Journal of Management Inquiry* in 2002, Kerr described his job at GE as being highly strategic, involving the identification of barriers to performance, the provision of support for strategic change efforts, and the facilitation of sharing of best practices across the company. The CLOs in Baldwin and Danielson's study saw their role as responding to changes within the business environment and aligning of learning with imminent business needs.

In 2005, according to this ASTD/University of Pennsylvania study, CLOs still spent most of their time on strategy and communication up and down their organizations to align learning requirements with business goals and to provide learning opportunities in the most efficient manner. They regard experience and education in both the fields of learning and business as valuable preparation for the role. Multiple career paths can lead to the position of CLO. The key competencies required are leadership and ability to articulate the value of learning in business terms.

The business areas CLOs are most interested in learning more about are strategic planning and change management. The learning-related topics they are most interested in learning more about are human performance improvement, measurement and evaluation, and learning technologies.

The results of our survey suggest that the new breed of learning executive has or wants a dual competency in learning and business, and a dual mandate to improve the performance of the business and the productivity of the learning function. To carry out this complex role, one must be a skilled learning professional and a business person, able to speak the language of both, and create a common vocabulary so that both constituencies can communicate.

Given that communication up and down the organization was identified as a key component of the CLO's job and given that trust is a key component of communication, the X-factor that distinguishes great CLOs from good CLOs may be the ability to gain the trust of their organization's executive team and business unit leaders. TD

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