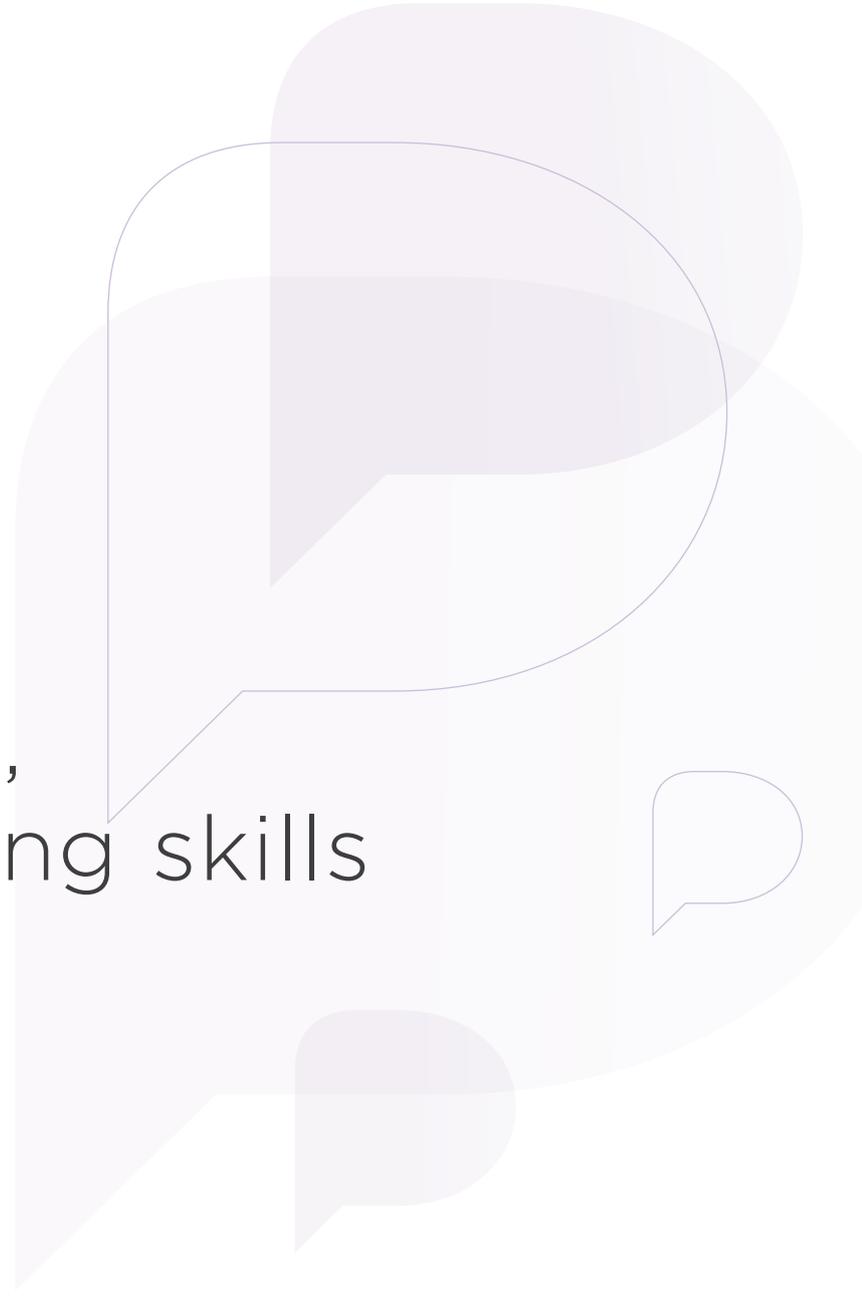# CIPD

Championing better work and working lives

Case study – PwC

April 2015

L&D:
Evolving roles,
enhancing skills

The CIPD is the professional body for HR and people development. The not-for-profit organisation champions better work and working lives and has been setting the benchmark for excellence in people and organisation development for more than 100 years. It has more than 135,000 members across the world, provides thought leadership through independent research on the world of work, and offers professional training and accreditation for those working in HR and learning and development.

About Towards Maturity

Towards Maturity is a benchmarking research company that provides independent expert advice and support to help organisations modernise learning in order to accelerate business performance. It leverages the data of its in-depth Benchmark Study, the largest learning benchmark in Europe. Since 2003 over 3,500 organisations and 17,000 learners have contributed to Towards Maturity's leading benchmarks. Thanks to the support of Towards Maturity's Ambassadors (27 learning organisations), annual benchmarking findings, case studies and resources are available to download for free at **www.towardsmaturity.org**

Acknowledgements

PwC case study

Organisation summary

PwC LLP is a network of firms in 157 countries, providing professional services to clients through four lines of service: tax, assurance, consulting and deals. The organisation employs over 195,000 people across 758 locations. In 2014 PwC reported global gross revenues of $34 billion.

The context

PwC is known throughout the world for its focus on people development. It's been number one in *The Times* Top 100 Graduate Employers list for 11 consecutive years, and there are a vast array of career routes and opportunities. Sarah Linsdell, Director, Global & UK Learning Technology & Transformation, explains how this translates to the culture of the organisation:

'The culture at PwC is very much about real-time development. You are being developed from the moment that you come in the door, and probably even just before it. It's the lifeblood of what we do, really. It powers everything.'

This ethos perhaps explains why L&D business alignment is so strong:

'L&E (learning and education) is really closely aligned with the business from the board downwards. Everything maps up to the overall strategy. ... If I look at the UK and I take that as an example, we have L&E leaders that are partnered with business leaders very closely, talking about what their needs are.' **Sarah**

This also means that the L&E teams need to keep their skills up to date and ensure they are providing cutting-edge solutions to the business.

The L&E structure

As a large, networked organisation PwC needs a learning structure which enables it to leverage insight everywhere in the world. This means that there are a number of teams which help to develop global strategy and drive consistency and excellence in standards. Sarah explains how the L&E structure works:

'We're a networked organisation; so, each of the member firms will have its own L&E department.'

The size of each L&E team will depend on the scale of that firm, and then cluster teams will help to co-ordinate activity across regions. Global teams are in place which make connections across territories. One of these global functions is the Learning Technology and Transformation Team. Their remit covers three key areas: foundation, adoption and transformation (Figure 11). This structure enables the personalisation needed to meet local regulation, while leveraging synergies across the world.

There are differences in individual territories for whether the L&E function reports to HR, human capital or another business area. Regardless of the structure, Sarah feels it's essential to ensure that strong connections are in place between HR and learning functions, and critically with the business:

'L&E (learning and education) is really closely aligned with the business from the board downwards. Everything maps up to the overall strategy.'

Figure 11: Team remit
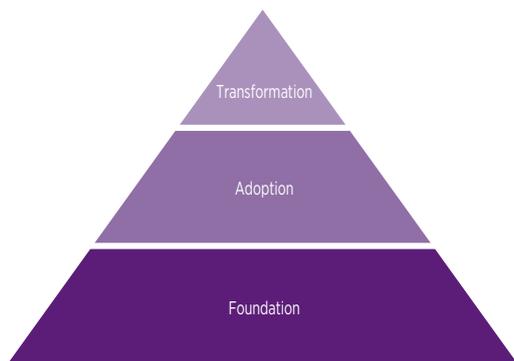
Transformation	Leadership of the PwC research and development agenda on learning technologies
Adoption	Consultancy with territories and groups on learning strategies and development and delivery of global content
Foundation	Management of the core systems powering learning across the organisation

'To me, it doesn't matter where you sit. If you're a small company and you're an L&E function, you need to be in with the board and you need to be able to understand what the priorities are. If you're a massive company like ours, you still need that absolute business linkage because the role of L&D is to solve business problems with the business, whether they're performance, whether they're skill-building or whatever. It's about solving business problems and being a business partner. I think if you're just in an ivory tower, then, you're not going to be relevant any time soon. I don't so much think it matters where you are. It's where you are linked to.'

Research and development

One of the most unique aspects of the team's remit is the 'transformation' section of the pyramid. Sarah shares what this means in practice:

'One of our functions is to look at things and then analyse them to decide whether or not it's right for PwC at this particular time. It's not so much just the transformation from the technology standpoint. It's also the transformation from the learning strategy standpoint; so, "What different educational methods are we using?" and "When we're talking about creating a blended learning solution, what do we do with that? How do we push it?"'

Sarah sees this activity as playing a vital role in the organisation. The global team can spend the time delving into new ideas or approaches, and then establish a point of view. This is something that at a territory level the L&E teams wouldn't have the time to do.

The team use a four-box model to evaluate and categorise various developments (Figure 12). This helps them keep track of key trends and determine organisational relevance. It's also a simple tool to use with stakeholders to explain the viewpoint on various L&D developments:

'I think, now, people are very much more connected and people are accessing so much more stuff online. Then, they're coming back and saying, "Why can't we have that?" … For us that model has been really critical, and it also gives you a really good way to talk to the business. I can sit with that four-box model and I can talk to any one of my business leaders about all the technologies, strategies or modalities.' **Sarah**

Figure 12: Research and development four-box model

Ones to watch Interesting developments, but not relevant to the organisation at this point in time	**Proof of concept** Technologies that are being explored further
Adopting today New technologies or approaches that are present in the organisation	**Established** Key established technologies or strategies

Transforming learning

The team are firmly committed to the principles of the 70:20:10 model, and are starting to focus on more informal learning methods:

'For us as an organisation, we're moving very much from big curriculums to experiences, events and a much more agile way of working. We're looking at not building these massive, great tanker ships, but building little assets, mini-ships, that we can deploy really quickly and that you can put together in a different format. If you build everything quite modular and in sections, people can find a personalised learning path through it. Then as an L&E function, I can think, "Right, I have that business need and I've got to deploy something there, so what is the suite of assets that I've got available to me?" Whether that's a one-day classroom course or whether that's a PDF on the latest and greatest. "How can I build all of those assets together and then push something out in a shorter time to market?"' **Sarah**

Sarah also thinks that this approach is helpful because it enables the team to respond to new business needs quickly, for example emerging topics such as data analytics or cyber security:

'I'm a really big fan of learning at the moment of need and not learning just in case I might need it in six months' time. If it's a system, why do I need to train somebody on a system when I could build all that performance support in at the moment of need?'

But in order for this approach to work, L&E needs to be involved at an early stage:

'If you're at the table early in those discussions, you can think about it differently. You can think about what is built into the job, what levels of coaching are needed, and what levels of support need to be there. ... That comes from having really close relationships with the business as well as being trusted business advisers, because you get invited in earlier to the conversation.' **Sarah**

It also means that learner expectations need to adapt to accommodate a more holistic view of learning and development:

'I don't necessarily feel that people understand that they're learning all the time, or that they understand what development is today, because it's completely different from the old-school model. ... We're flipping classrooms and we're much more about experiences when you get to a classroom, rather than a one-way, sage-on-stage, just pushing knowledge at you model.' **Sarah**

The impact of technology

As part of the 'transformation' remit, the team investigate technological developments and trends and consider how they can be applied to L&E. They've seen significant changes as a result of technological growth in the external environment:

'Over the past five years, the trend has been that the consumerisation of technology has been overtaking how fast learning teams within organisations can adapt and turn themselves around to meet the changes.' **Sarah**

This certainly applies to mobile learning, where user experience has rapidly developed in recent years:

'I think one of the biggest challenges for any sort of organisation is "How do you make what you offer look as good as what everybody is accessing outside of work?"' **Sarah**

The vast array of information available and ease of access through technology is also influencing learning and development, as many resources can now be 'curated' together, rather than created from scratch:

'It's the access to free content, and being able to watch a Ted Talk, being able to engage in MOOCs [massive open online courses], being able to harvest all this great subject matter expertise that's out there.' **Sarah**

Sarah feels that technology is not only affecting the content and delivery of learning, it's also influencing L&D capability:

'The embedding of technology in everything we do has really changed the skills you need as an L&E practitioner today.'

L&D skills

More broadly Sarah recognises that the L&D profession has a big shift to make in skills and capability:

'Instructional design is never going away. You've got to be good at that, but you've got to be good at having real conversations and that's the performance consulting side of things. You've got to be able to unearth what the business needs are and you've got to be able to come up with real, creative solutions that aren't just about the classroom.

'I think that's where the skills really need to change, because we have an awful lot of really great people in the industry who have only ever designed one way. Suddenly, we are asking them to design in 20 different ways, and ways that we've not yet uncovered. I think that's the biggest change for me in terms of the skills that you need. You need to think differently. You need to think like the business that you're in. You need to think about how you can design in pieces and bring things together, what you can leverage, and what you can bring from the outside.'

Digital learning academy

Five years ago Sarah and her team started exploring how they could build these new capabilities throughout the L&E population, and came up with the idea of a Digital Learning Academy:

'The driver behind initiating the whole academy was the fact that we didn't have the skills that we needed. If we were going to transform the way that we were going to deliver learning and education, if we were going to transform anything, it couldn't be done by a team of ten people sitting globally. It's got to be done from the grassroots up.' **Sarah**

The academy consists of two blended curriculums utilising a variety of digital assets and learning methods, such as virtual classrooms, coaching, e-learning and PDFs. The first curriculum covers understanding the different technologies and tools you can use in L&D. The programme is completed over six months, and in mixed cohorts of eight people. Everyone has a coach and the learning is grounded in the business:

'They have assignments; they have a business problem and they have to go away and think about how they would solve that using the things they've got at their disposal.'

The second curriculum involves having great conversations:

'It's: "How do I, as an L&E person, go and sit with a business leader and convince them that we need to do things differently, have that challenging conversation or talk to them about not being afraid of using a different approach?"' **Sarah**

The programme concludes with a role play:

'The participant will have a half-hour conversation with a business leader. They will have a business problem and they will have a challenging conversation, and there will be a coach on the line who then gives them feedback at the end of that.' **Sarah**

The two curriculums are supplemented with a variety of tools and mini-blends on particular topics, such as creating video content. These are kept up to date as technology evolves. As the programme is digital, the content and learning can be accessed anywhere in the world, without the need for face-to-face interaction. Everything that the team learn through their research and development activities is also translated into new information and content to support global ongoing learning.

Impact

Kerry Georgiou, who works in the Global Learning Team, was recently a participant on the programme. She feels that the academy helped to expand her knowledge and awareness of different learning methods:

'Now I can get involved in group discussions because I'm aware of terms they're using – for example blended learning. I think it just makes you more confident, and you get to meet new people and see what they think about things.'

Kerry thinks that learning from the experience of the other programme participants and from experts is a key benefit of the programme:

'I think learning how people made errors in the past in their working methods has helped my day-to-day practice, because I am aware of what to do, and what not to do.'

It has also prompted her desire to continue to develop:

'It definitely makes you more curious about things, because you become more interested and more engaged. You actually want to go away and ask people more, and you want to learn more.'

Alongside positive delegate feedback Sarah has also seen clear business benefits through the academy. Leaders have reported that *'the conversations that have been happening have been very different from the conversations that were happening 18 months ago.'* On a practical level the L&E teams in the various territories have also been developing more blended learning initiatives, rather than relying on classroom training.

Future trends

Crucially, Sarah hasn't stopped thinking about future L&D capability. The team are currently exploring how the increasing sophistication of learning data might influence activity:

'I think harnessing the power of our data and looking at what that gives us is going to make us even more agile. I think it's also going to really help us understand what's working and what's not.'

This may also enable more personalised learning, and greater focus on smaller, targeted interventions which can drive effectiveness:

'I think everyone wants to do more with less. ... If you can do things in a different way that enables you to spend less and be just as effective by doing something differently, shorter, in a different format, it means that you can spend more or the same on some of your much bigger interventions that you need to make.'

In anticipating these changes Sarah continues to feel that technology will have a role to play. Not necessarily because of cost saving, but because of the myriad other benefits it brings:

'Technology does not make things cheaper in the learning space sometimes. It is a different investment, but what it enables you to do is to do things differently, more effectively and more relevantly for learners today, with more learning at my fingertips and more learning at the moment of need, right where I'm working today. Bringing learning and work closer together is one of the key goals.'

With a clear purpose, and aligned initiatives designed to build L&D capability, PwC are on track to achieving this integration and maximising development.

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