

# Tom Evans: Using Learning as a Business Driver at PricewaterhouseCoopers

*Kellye Whitney*

It's rare to come across someone who's been with the same organization for more than a few years, let alone 30. It's a goal for most learning organizations to mine that deep well of experience and knowledge for performance-boosting nuggets that new or less-experienced managers can digest and repurpose.

Tom Evans, a partner at PricewaterhouseCoopers (PwC) and chief learning officer, is of a similar mind. Using learning and development programs that blend newer and more experienced managers with a real-world business platform for learning, he has initiated positive, measurable changes at the firm.

Evans is no stranger to business. Trained and licensed as a certified public accountant, he began his career at PwC in the assurance practice. He said assurance offered him a great place to ground his roots because the field frequently requires a skeptical viewpoint, a high level of intellectual curiosity and the strength to stand by your convictions.

He took those traits with him when he was asked to move to the education function in 1989. The temporary position to launch the firm's more definite focus on industry-based education in financial services, manufacturing and telecommunications (all areas in which he had experience) quickly expanded.

Evans became a program director for PwC's learning design and development areas, and then he moved into the line of service lead position for education in financial advisory services. This role became global in scope.

From there, Evans became COO for the firm's middle-market sector, and he returned to education in 2001, assuming the role of chief learning officer for the U.S. firm in 2003.

At last count, PwC had more than 140,000 people in 149 countries, multiple lines of service and 22 industry-specialized practices in fields such as assurance, tax, human resources, performance improvement and crisis management. In the United States, PwC has about 30,000 employees and partners.

Evans said his greatest challenge is feeding the learning mill for such a large, dynamic firm, one in which regulatory influences often drive the scope of services, thus driving the skills professionals will need to master to serve clients effectively.

"Many of our clients are large, multinational, global organizations, so the need to deliver services consistently around the world is an influencing factor for us," Evans explained. "Their level of specialization is rising. Clients expect our professionals to deliver high-quality solutions and to bring ideas and solutions that truly work in their environments. This requires developing good relationship skills, sound business judgment and the ability to truly help our clients."

It's been a challenge to provide appropriate learning programs for the firm's four generations of staff and partners. Each has its own educational viewpoint and learning preference, although Evans said there is harmony among the groups when it comes to an acknowledged need for information that's easily accessible and available in ways that encourage learning to be absorbed quickly.



**NAME:** Tom Evans  
**TITLE:** Chief Learning Officer  
**COMPANY:** PricewaterhouseCoopers

**SUCCESSES:**

- More than half of PwC performance improvement last year was attributed directly to formal training programs. Other contributing factors included self-study, coaching and on-the-job training.
- PwC's increased commitment to coaching led to the "Everyday Coaching" initiative and contributed to a nearly 10 percent jump in employee agreement with the statement, "I receive meaningful feedback on my performance."

- The "Turning Point" program, targeting senior associates transitioning to manager roles, contributed to a 55 percent reduction in turnover among attendees, saving the firm \$1.6 million.
- Diversity training, combined with related efforts across the firm, contributed to PwC being awarded several prestigious honors, including the Catalyst Award, Working Mother's Top 10 and Diversity Inc.'s Top 6.

**LEARNING PHILOSOPHY:** "A true learning culture is as much about coaching as it is about continuous learning. To foster ongoing development, we must all be teachers, and we must all be students. By taking advantage of 'coachable moments' — on the job, every day — we bring theory to life, and we all grow together."

At a programmatic level, however, Evans said PwC's partners understand the value of education and how it can positively influence behaviors and organizational culture in a strategic way. Business-pulse survey results indicate effectiveness has improved steadily every six months.

"Today, learning is seen as highly effective and creating a lot of impact," he said. "We've been able to move the thinking in our firm forward to embrace learning and what it means to coach and develop people in the workplace. Last year, the firm rolled out a global competency framework, which provides a foundation of expected behaviors, from which we can develop our people and have productive conversations with them."

Evans and his team have created two particular programs to stimulate dialogue regarding how PwC serves its clients. "Managing Complex Relationships," which is grounded in folklore or storytelling, gathers together a group of new and more experienced partners to discuss client situations and how to address them.

"Basically, we stimulate the conversation and explore what our history is, how we serve our clients and what the underlying behaviors are around having the strength of conviction to bring forth issues and

address them," Evans said. "You don't go it alone. You count on the support of your peers and engage in dialogue around how successful partners have cultivated trusted relationships, increased their impact with C-suite executives and leveraged the network of the firm to support our clients. The program has done very well."

At the staff level, PwC has launched an unconventional learning program called "Turning Point," which Evans said many participants view as a gift. The program is grounded in workforce needs as they relate to the influence and the convergence of family, career and community on a very personal level.

Employees take an introspective look at how each of these affects the way they work, perform and make decisions. Program content centers on how employees can preserve intellectual fitness, physical fitness and ethical fitness, and participants grapple with how they can make those three spheres of influence work within the context of a highly client-demanding professional services firm such as PwC.

The firm brings together about 100 people each time it runs "Turning Point." The program includes four and a half days in residence and involves a significant amount of coaching. Participants are divided into groups of five so they form peer groups, and then sounding boards are created from that, Evans said.

"The impact has been enormous — people who were feeling isolated from the organization have written back and talked about how they're still here, they've changed their job role to something more satisfying and engaging, and they've helped others improve performance and engage. You can't quantify that value," Evans said. "The fact that you're able to influence someone who's feeling distant and on the shelf in the organization, actually turn them around and bring them back to a performance level that says, 'I'm willing to engage, I'm willing to help others and I'm willing to create success' — that's huge for us."

Because learning and business function interchangeably at PwC, many of the challenges that arise in the business environment become the focus of specialized learning activity. For instance, Evans and his team do a significant amount of work to help partners and employees from different lines of service such as assurance or tax stay current on technical requirements.

"We have to ensure that our people can serve our clients from a technical standpoint," Evans said. "I don't see that as a unique challenge — I just see that as core to what we do. Equally important is the way we interact with each other and with our clients, working in teams that are fully engaged and focused on developing relationships that are based on trust. At a professional services firm, you can almost guarantee, if someone says, 'this is technical information

that's important for you to do your job,' you can get everybody in a room when you need them. But if you were to say, 'I'm going to launch a program because we need to focus more on our soft communication skills or facilitation or relationship skills,' that's a different type of challenge."

This type of challenge is part of the reason PwC's coaching initiative is so critical. Evans said people actively look to have productive conversations linked to coaching and development.

"The ability to deliver a professional service is a craft that you develop and cultivate over time," Evans said. "One of the important aspects of that is to engage in good, development-based dialogue. When we had teams working side by side in an office where they could actually have an ongoing dialogue, coaching was not as much of an issue. Now, technology enables people to communicate at a distance. You have the ability to sign on 24x7, and face-to-face dialogue is diminishing. That posed a challenge for us. We ultimately found it critical to launch and successfully integrate the 'Everyday Coaching' initiative into our firm, and we did that over the course of this year."

Pulse surveys are only one method PwC uses to track learning effectiveness. On a basic level, the firm gathers standard Kirkpatrick metrics using Levels 1 through 4, as well as the usual evaluation sheets at the end of a program. Select programs might require participants to pass a test to complete the program, and Evans said this is an increasing trend within the learning environment.

"We do extensive work to look at return on value and investment, and we do that selectively to make sure that we're creating value," Evans said. "In a normal course, we will conduct focus groups throughout the year and actually see how training content is being applied in the workplace."

Additionally, Evans said PwC constantly evaluates how well it delivers education in a way that's effective and creates impact.

"We're continually looking at ways to ensure we remain relevant and drive value for our people and our business," he said. "In the future, I see us moving learning to the point where it's actually embedded into everyday work, within team environments. That will be our next leap." ■

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WHIRLPOOL.**

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