

## Virtually Integrated (Apr 07)

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Top-notch technology takes IBM another step up the ladder of learning excellence, the integrated way.

By Margery Weinstein

The corporate headquarters of technology behemoth IBM in Armonk, N.Y., is deceiving. Here, in the country, with streams and wild turkeys running through its backyard, is the IBM Learning Center, where some of the company's sharpest training initiatives have launched. Its latest is to fully integrate learning into the workflow of its 350,000 employees via personalized, avatar-rich virtual platforms. Doing so, the company says, will allow it to leverage the advantages of its global workforce, and better prepare its next generation of leaders.

"We have to be on the cutting-edge of expertise," says IBM Vice President of Learning Ted Hoff. "The overall strategy is we have to enable people to learn every day in a dynamic way based on the work they need to be doing now, and into the future." That means on-demand job aids, such as collaborative online platforms that allow employees to learn from their peers, and virtual tools that give them instant access to subject matter experts. "There's so much to know," he says, "you want [employees] to be able to get information, and learn about what they need to know, at the moment they need to know it."

Besides having ready access to the needed information, it has to be available in the format that will be most useful to the learner. Varied learning needs require varied mediums for delivery. The media, says Hoff, will differ depending on whether knowledge just needs to be acquired, or whether the company needs the worker to go beyond that. "Some learning is about being able to really apply yourself at a particular job, and you have to be able to learn based on some trial and error, and experience." Knowledge gained through IBM's Expert Tracker, an online tool that allows employees to learn from expert peers globally, is enough in some cases, but in others, use of simulations, in which the learner is immersed in solving a real situation, is a better idea. Sometimes, employees need to log onto one of the company's collaborative online spaces to learn by working on a project with a co-worker.

Facilitating learning with peers, who, Hoff says, are often just as likely to be located down the hall as across the world, is a major initiative at IBM. "The biggest area of expansion in globally integrated learning is around powerful peer-to-peer learning," he says. Besides tools like Expert Tracker, he points to Same Time, the company's Lotus Notes technology that enables global instant messaging. "We're doing an enormous amount," Hoff says of global peer learning. "We're doing more than we did last year, and that was more than we did two years ago."

Using technology to connect employees globally creates what Hoff calls a 21st century master apprentice learning. It isn't enough to allow workers continents apart to e-mail and instant message. IBM wants to go beyond that in enabling international mentorship-based learning. "I want to learn from the person's expertise, but I also want to learn from the person at a human level," he says. "I want to gain some of the spirit of the innovation that an expert mentor can provide."

Peer learning can occur just as spontaneously as it might if all of IBM's employees were located in the same building. Recently, a young IBMer participating in the company's virtual 3-D online environment, in which employees create avatars to interact with one another, unexpectedly met one of IBM's most senior technologists. The two discussed their roles at the company, what they were working on, and ultimately, shared ideas. Hoff says such serendipitous meetings between senior and less-experienced employees are "increasingly happening very naturally at IBM."

The expert peer knowledge and information employees can tap into at IBM won't help them if they can't find it, or if what they find isn't relevant to what they need. So, about five years ago, the company went a step further, personalizing its intranet, which it calls "W3." When employees log on, the system recognizes not only their name and password, but job role, and information needs, says Vice President of On-demand Learning Nancy Lewis. With such personalization, employees don't have to stop their work every time they have a question. "We bring the learning to the work," says Lewis. When employees working on the intranet move their mouse over a keyword, IBM's Smart Tips tool automatically brings a related best practice to the screen. "Think about IBM's corporate intranet becoming a real, virtual place for the corporation," she says. The same intranet the employee logged onto at 11:30 at night in a hotel in Shreveport, La., can take them to an online space capable of replicating the floor plan and shelving of the Seattle retail store IBM is creating a computer network for. "It's better than The Sims," says Lewis of a comparison between IBM's 3-D virtual space and popular World Wide Web simulated gaming environments, "because it re-determines our future."

In addition to the personalized intranet pages each employee accesses, workers have the ability to build their own work environments. This is crucial since, Lewis notes, they often work with clients who ask them to do what's never been done before. "More often than not, we're dealing with our clients in places they haven't gone before," she says. "It's not like you can go to a library and just say, 'So and so did it, and we'll just copy that.' We're actually inventing."

That means the virtual retail space accessed by the IBMer stuck in her Louisiana hotel room may have been built by this worker and her peers from scratch so, in Lewis' words, they could "rehearse a work process." Employees can create customized 3D work environments to figure out how a computer network might function in the business environment they're designing it for. The IBMer in the sticks on a business trip, and her colleagues back in the office, also are able to bring in other peers, who may not be directly assigned to the project, for advice. "You can pull in experts, and have a dialogue, and do your what-if games," says Lewis.

Providing each employee with the exercises they need to grow also is a part of the personalized intranet. Sales reps are able to access team learning exercises through the intranet, which, along with the instruction they're given on an individual level, speeds up "their time to capability." More than the convenience of reaching dispersed sales reps for training, the work they do on the intranet, specialized to their role, is much closer to how they actually work than live classroom learning would be. "This is where learning mirrors real work," says Lewis. "IBM accounts teams are virtual by definition because we leverage resources from across the company based on our client needs." They need to know how to efficiently use collaborative technology like conference calls and shared online spaces, she explains. Online environments, like those provided by the intranet, where they can practice together as a team, are a necessity. "The direct effects of that," Lewis explains, "are helping them actually put world-class solutions together for our clients."

## **Global Gains**

The varied learning needs of IBM's workforce require the company to constantly innovate new mediums to deliver knowledge, says Vice President of Learning Ted Hoff. That creative process may start at global headquarters in Armonk, NY, but often is added to, and improved, by overseas workgroups. The addition its Chinese division made to the company's "Your IBM" orientation program, using IBM's virtual 3-D technology, is being incorporated globally. The technology, which allows workers to meet, greet, and work together as avatars in simulated online environments, was used in China to help onboard new employees. Before their first day, new hires logged onto a virtual platform, replicating the physical offices they would work in, and got to know future peers as avatars. "It's not about innovation created in the U.S., and diffused overseas," says Hoff of the 65 percent of its employees based in another country. "It's about global collaboration."

All new learning mediums piloted abroad are monitored in Armonk to ensure they meet corporate standards. "We keep track of what's being developed in the rest of the world," says Hoff, "so we can understand reasonably quickly whether any particular technology is effective, whether it's cost efficient, conducted in a way that's consistent with IBM's values, and whether it has any unintended consequences."

The integration of U.S. and overseas learning efforts, which Hoff says has increased over the last five years due to the growth of talent in emerging markets, is a key advantage in leveraging technology. Besides providing greater scale for technology investments, Hoff says the company's international learning effort "helps us because it gives us a rich, diverse set of IBMers, and when you have more diversity and scope, more innovation comes out."

## **Time Management**

Global, technology-facilitated learning is key at IBM, but making sure it doesn't interfere with employee job demands also is essential. Its Expert Tracker online tool allows workers to interact with subject matter experts internationally, and provides the experts listed on the system the opportunity to stipulate hours of availability. Similar to the office hours listed on the doors of college professors, Vice President of Learning Ted Hoff says the added control makes participation by harried senior executives more likely.

"We have to navigate the traffic of how one person taps into another person who's a mentor," says Hoff. This new time management feature on Expert Tracker may provide a model for other technology-enabled peer-to-peer learning at IBM. "That may be an approach to allow us to expand peer-to-peer expertise learning," says Hoff, "but in a way that allows people to protect their time when they need to focus on other things."

## **Snapshots**

**Ted Hoff** joined IBM in 2001 as vice president, Learning. Prior to joining IBM, he served as a Director, as well as chairman of the Compensation Committee for Courier Corporation. He serves as a director of MassINC, a leading public policy think tank in the Commonwealth of Massachusetts, and as a director of the John F. Kennedy Library Foundation. Additionally, he serves on the Conference Board's Council on Development, Education & Learning; the Executive Development Associate's CLO Forum; Jobs for America's Graduates, Inc.; Corporate Executive Board's Learning & Development Roundtable; and Credit Suisse Business School Advisory Board. He holds a Bachelor of Science from the Georgetown University School of Foreign Service and an MBA from Harvard Business School.

**Nancy Lewis**, vice president, Sales and On-demand Learning, joined IBM in 1979. Prior to her current position, she served as vice president, On-demand Learning, IBM; director, IBM Management Development; as well as held other executive sales management positions. Lewis is a regular keynote speaker at professional conferences on learning best practices. She has been selected to serve on the American Society for Training and Development (ASTD) Certification Institute Board of Directors and the ASTD Learning Executives Network's Advisory Council. She is a member of the Conference Board's Council on Learning, Development, and Organizational Performance and the Wharton/Penn GSE CLO Graduate Program Advisory Board. Lewis also serves on *Training* magazine's Editorial Advisory Board.

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