



**Bob Danna**

Director

**Bersin**  
by **Deloitte.**

## **High-Impact Leadership Development and Insights on Developing Global Leaders**

*1:00 p.m. Keynote*

### **Strategic Opportunity:**

Today's leaders face a daunting set of complex business issues. With the current economic volatility, and the speed of social and technological changes, the challenges facing leaders are increasingly great. The business opportunities and associated leadership challenges are global.

Recent Bersin by Deloitte's research shows that many organizations fall short in three areas: developing leaders, developing high potentials and defining an overall leadership strategy.

### **Lessons Opportunity:**

Bersin by Deloitte's research reveals how critical it is for organizations to understand the competencies and potential within the leadership ranks, as well as the usefulness of diversity within the leadership team. Organizations should first determine leaders' strengths and opportunities for improvement, and then create tailored development plans for leader segments or the individual.

### **Lessons Learned:**

- Effective leadership development is critical for achievement of business goals and is now being invested in more heavily than in past.
- Leadership development requires the definition of a strong leadership strategy, not only the implementation of leadership development programs.
- Leadership development is now targeting front line and mid-level leader audiences, not just senior leaders and high potentials.
- Selected competencies and capabilities should be developed to skill up leaders to be effective in the 21st century.
- Leadership development solutions are modernized – blending formal and informal learning approaches.
- Leadership Development should be globalized.
- Technology has an integral role in leadership development.

## Leadership Development Strategies for Unleashing Workforce Potential

### CLO/CTO Panel Discussion

9:25 a.m.



**Ann Garvey**

Leadership &  
Professional Dev.,  
Deloitte Tax



**Angie Zeigler**

Director



**John Pandl**

CLO



**Cindy Seffair**

Director of Learning  
and Development



**Randy Plunkett**

Director of Community  
and Government  
Outreach



During this roundtable panel discussion, senior talent and leadership development executives will share stories, case studies, lessons learned and best practices regarding how some learning, talent and leadership development groups are implementing innovative leadership development, the issues they struggle with to align their leadership development with their business strategy, how to accelerate the development of key leader talent, and how to effectively develop millennial and global leaders.

### Discussion Points:

To help guide this roundtable discussion, we'll encourage participants to share the following:

1. Research from leading academicians such as Jay Conger at The Kravis Leadership Institute, Cisco and others indicates that collaboration is a critical success factor for effective leaders and collaboration is built on three (3) foundations: technology, process and culture. Let's take a closer look at the culture component. How do effective organizations go about creating a culture of shared goals rather than a culture of internal competition with a silo mentality? What organizations are iconic in this space? And why?
2. How are organizations evolving their performance management philosophy and process to align with our new work environment/complexity?
3. Many of our organizations today have fewer hierarchical levels and more permeable boundaries functionally and organizationally. Research shows that appropriate organizational network connectivity is an effective way to enable leaders to handle complexity and has a substantial impact on business performance. How are organizations implementing inter- (between companies) and intra- (within company) organizational networking?
4. What is the impact of millennial leaders' expectations of development on how we think about leadership development? And, how do we get millennial leaders to adapt to the demands of leadership development? What is the call to action?

## Leaders of the Future: Innovative Leadership Development

10:30 a.m.



**Erickajoy Daniels**

Talent & OD Leader



**Joe Knytych**

Director



**Michelle Burke**

Director



**Tony Rutigliano**

Senior VP



**Judy Whitcomb**

CLO



### Strategic Opportunity:

Accelerating time to mastery is the buzz among highly performing organizations. For winning organizations, “speed to market” is no longer only relevant to their products and services but also plays when investing in leadership development. Companies who wish to outperform their peers are figuring out quickly what it means to fast-track leader development and the business value it brings. This roundtable panel discussion dives deep into what accelerated leadership development is, what it looks like and how top-performing companies are implementing and sustaining unique, high-payoff leadership development programs.

### Discussion Points:

To help guide this roundtable discussion, we’ll encourage participants to share the following:

1. What is accelerated leadership development?
2. Accelerated leadership development various points of the talent lifecycle – talent acquisition, performance management, succession management. How are you ensuring that leadership development is effectively integrated with your other talent processes?
3. What are the barriers to integrated leadership development and how do you overcome them?
4. Implementing accelerated leadership development is a challenge. Sustaining it is even more of a challenge. How do you ensure that your development solutions are sustained over time? And how do you manage leaders’ expectations that their participation is for developmental reasons, not a promise of promotion?
5. When you acquire new HiPo talent, are they invited? Or required? To participate in your leadership development solutions? Why or why not?

## Vets Fueling Corporate Talent Opportunities for Unleashing Workforce Potential

10:30 a.m.



**Frank Anderson**

Past President,  
Defense Acquisition  
University



**Randy Plunkett**

Director of Community  
and Government  
Outreach



**Tom Reilly**

Vice President



**Phil Mondrowski**

Sr. Vice President



### Strategic Opportunity:

Veteran experience, talent, and ability is usually lost in translation. Those serving in the military not only have a language barrier in trying to relate their job classification in civilian terminology, they also have no clue how the civilian workplace culture operates. This issue becomes more complicated the longer one serves. So, the irony is, as a military member gains valuable experience in their job, as well as in management, diversity, human resources, and supply chain management to name a few areas, they also think that the military workplace is mirrored in the civilian sector. After all, that is all they know!

### Discussion Points:

To help guide this roundtable panel discussion, we'll encourage participants to share the following:

- What ongoing training programs are utilized in your organization to educate recruiters, hiring managers, supervisors and peers on the unique skills that veterans bring to the workplace?
- Does your organization have an Employee Resource Group that focuses on veterans, military, and spouses?
- What advice or recommendations would you give to veterans with regard to their resume, interviews, and seeking a career versus a job? How do we become world-class in measuring and improving our impact?
- Recruit and hire is a critical first step in your talent management life cycle, but what initiatives have you deployed to develop and retain veterans to fill leadership and technical gaps within your organization?

### Post Action Review:

- What actions are you taking to help ensure that talented veterans successfully transition from "boot to suits" to help fill leadership and technical gaps within your organization?
- What is your organization doing to develop and retain veterans after the hire?



**Marty Rosenheck**

Chief Learning Strategist



## **Unlocking the Potential of Informal, Social, and Experiential Learning**

*10:30 a.m.*

### **Strategic Opportunity:**

Real value – higher productivity, quality, and customer satisfaction – comes from getting new hires or existing employees up to a high level of proficiency quickly and efficiently. However, formal training often does not get the job done sufficiently. Why? Cognitive research has shown that people learn to be top performers primarily through experience. According to the Center for Creative Leadership, only 10% of learning in organizations is formal (e.g., elearning, workshops), 20% is informal (e.g., social, coaching, performance support), and 70% is experiential (on-the-job). The problem is that informal and experiential learning can be haphazard and difficult to track. It's time to unlock the potential of informal, social and experiential learning.

### **Learning Solutions:**

In this session, you'll see how emerging technologies are allowing organizations to align informal and experiential learning with competencies to create flexible learning paths, track progress, and recognize results. They are deploying a new post-LMS software infrastructure built on next generation SCORM (Tin Can), Mozilla Badges, mobile devices, and ePortfolios to create a coherent learning system that coordinates and tracks 100% of learning to optimize the path to performance.

### **Lessons Learned:**

- Align all learning with organizational goals and desired competencies.
- Use mobile devices to guide and track learning on the job.
- Capture data on what people are really doing to achieve performance and use analytics to link to results.

## Quality Training Best Practices for Continuous Improvement

10:30 a.m.



**Libby White**

Director SSO Quality  
Assessment &  
Improvement



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**Kery Mortenson**

Sr. Manager  
Training  
Effectiveness



**Lorne Hamilton**

Executive Director



Knowledge applied. Business accelerated.



**Angela McKeirnan**

Director  
Quality & Process  
Improvement



### Strategic Opportunity:

Join us for a discussion on Quality Training Best Practices for Continuous Improvement. This roundtable discussion is to explore collective insights and ask questions related to how learning and quality line leaders including:

1. Quality is a key part of learning and therefore important to the success of the company.
2. Sharing of how quality is improved at leading organizations
3. Understanding the common goals of quality and learning in organizations.

### Discussion Points:

To help guide the roundtable panel discussion, our facilitator will cover some or all of the following:

1. Knowing there are two forms of quality we will discuss here, what does quality look like at your company?
2. What is the main business drive for quality and quality improvement and how does this get accomplished?
3. How does poor quality impact your business and what do you do to ensure your customers receive outstanding service?
4. How do we improve quality at your organization?

### Lessons Learned:

Powerful results can be realized with the Learning and Quality functions collaborate under a shared and coordinated vision by sharing quality performance goals, access to data, and a common leadership that can drive integrated and focused actions.



**Bob Mosher**

Chief Learning Evangelist



**Strategic Performance Support:**  
*Is It Possible and How Do You Measure It?*

2:00 p.m.

**Strategic Opportunity:**

Training has been chasing ROI for decades with many falling short. Do you know what the impact of your training efforts are on the organization? Are you measuring them? But, the real question is, can you truly make the connection between what you are providing to the business and how it has improved employees' productivity, and therefore the bottom line?

Can you provide data that shows you're making a real, measurable business impact to key performance indicators (KPIs)?

**Learning Solutions:**

In this session we will discuss how Performance Support can help us prove we're delivering strategic value to the organization, by specifically looking at:

- Enabling the Kirkpatrick Model through Performance Support
- Linking Learning and Performance Support to improved KPI improvement
- Organizations that are making the journey

**Lessons Learned:**

In order for us to be successful, we needed to:

- Begin designing for all 5 moments of need
- Become performance consultants and champions for true performance based outcomes
- Find a first project to begin the journey!

## Improving Talent Management through the Use of Simulation

2:00 p.m.



**Angela Dresen**

Manager  
Leadership  
Development



**Suzanne Sherry**

Director  
Global Talent



**Kathy Larson**

Managing Director,  
Commercial  
Business



**Carmela Richeson**

Manager, Leadership  
Development



### Strategic Opportunity:

Talent management is on the tip of most CEOs' tongues right now, and yet most organizations still struggle to find a successful approach. Simulations have been used quite effectively to encourage adoption, consistency, and proactive engagement by line leaders in talent management activities – hiring, scheduling, promoting, assessing talent, succession planning, determining enterprise risks, and sharing talent. This session will review some of the approaches taken by diverse companies to engage a broader audience in proactive talent management. We will review some of the approaches taken and then proceed to a panel discussion of the subject.

### Discussion Points:

To help guide this roundtable discussion, we'll encourage participants to share sales performance challenges, success stories and innovative experiments including:

1. How do you get the engagement and ownership of non-HR leaders in talent related processes and practices? And what is the right level of engagement for non-HR leaders?
2. What are implications of applying an integrated talent management process for a global organization?
3. If everyone is going after the same people, how can you differentiate your company? How does the learning or training approach help achieve differentiation?

## Competency-based Adaptive Training Strategies

2:00 p.m.



**Ryan Meyer**

Technology Team  
Lead



**Wendy Fencil**

Global Director,  
Talent  
Development

HEIDRICK & STRUGGLES



**Laci Loew**

Executive  
Consultant



**Michelle Burke**

Director



### Strategic Opportunity:

From hiring and succession planning, to performance assessment and feedback, to personalized career and learning plans, competency models can provide a consistent framework for organizational and individual development. In this session, TiER1 Performance Solutions and the Executive Learning Exchange's members are partnering to create a roundtable panel discussion to discuss how various companies are utilizing competencies to make their organizations more effective.

### Discussion Points:

To help guide the roundtable panel discussion, our facilitator will cover some or all of the following:

- Are there particular areas (hiring, performance management, succession planning, or learning) where organizations have seen the most benefit from using competencies?
- How can competency models be used to accelerate employee training?
- What are the strategies for developing an appropriate competency model?
- What strategies have been most effective at gaining buy-in and commitment when first introducing a competency-based approach?
- What types of assessments or activities can be used to determine an individual's or team's proficiency?

## Continuous Improvement L&D Strategies

2:00 p.m.



**Chuck Adams**

Global Talent Dev.  
Operations Leader



**Thomas Samuel**

Manager



**Trina Moskalik**

Workforce Solutions  
Advisor



**Lisa Schumacher**

Director



### Strategic Opportunity:

How do leading companies increase Continuous Improvement (CI) competencies among employees (at different levels) across the organization to support and sustain a cultural shift in CI?

What are the various CI competencies and how do we move beyond solely 'learning' to a 'learning and applying' model to facilitate the Plan-Do-Check-Act (P-D-C-A) learning cycle among individuals.

### Discussion Points:

To help guide this roundtable discussion, we'll encourage participants to share the following:

1. Continuous Improvement (CI) is quite the buzz-phrase now... what does CI competencies mean in your organization?
2. How do you manage the learning and applying aspects or competency development?
3. Does your Continuous Improvement journey support an overall business strategy?
4. How do you ensure an increase in Continuous Improvement competency across the various levels of the organization?

## Unleashing Potential through Coaching & Teams

3:15 p.m.



**Dan Ahern**

Vice President



**Jane Dowd**

Director



**Judy Braun**

Vice President

HEIDRICK & STRUGGLES



**Mary Jo Burfeind**

Vice President



### Strategic Opportunity:

In an environment of constant change--mergers, acquisitions, divestiture, executive turnover, cost containment and more--talent and learning leaders need to remain ever-diligent to the dynamic and evolving needs of developing leaders and teams. How coaching and development initiatives get communicated, planned, delivered, supported and rewarded, in alignment with business objectives, will determine their efficiency, effectiveness, outcomes and ROI—and may determine the success or failure of leaders, units, divisions or entire organizations. Building effective teams is an executive competency high in importance but short in supply. How do we meet today's challenges in order to “win” in these areas of development?

### Discussion Points:

To help guide the roundtable panel discussion, our facilitator will cover some or all of the following:

1. What do we mean by coaching? How is this different from advising, feedback and/or mentoring?
2. Why should we care about helping our leaders all be better coaches? What's the strategic intent?
3. How are you using coaching in your organization? What is your deployment strategy?"
4. What changes, if any, have you made to ensure your business/HR systems are aligned to support these capabilities?
5. How will you know if you're being effective/what would “good” look like?
6. What lessons learned thus far?

**Rolling-out Global Learning Opportunities: *Consistent and Locally Adaptable***  
3:15 p.m.



**Tim Ahrens**

Curriculum  
Manager



**Peter Grassl**

Director  
Enterprise Learning



**Mike Quinlan**

Principal Associate



**Adrienne Guerrero**

Global Talent Dev.  
Program Manager



**Strategic Opportunity:**

For many multi-national organizations, growing business and expansion into emerging markets have resulted in greater emphasis on developing talent. Business leaders expect Learning and Development (L&D) will provide the same learning experience to all employees across different geographies.

A common challenge for L&D is to ensure that we design content to meet global needs and at the same time are able to accommodate cultural/local needs in each of our markets. In addition, we have had to develop cost effective and efficient processes around implementation.

This roundtable panel discussion is an opportunity to share our collective experience in designing and delivering global courses.

**Discussion Points:**

To help guide the roundtable panel discussion, our facilitator will cover some or all of the following:

- Initial Challenges
- Global Design and Implementation Process
- Insights from Global Design Process
- Insights from Executing Implementation
- Results
- What's worked, or not?

## Exploring Digital Performance Support & Learning through Games

3:15 p.m.



**Roger Turnquist**

President



**Paula Kalous**

Sr. Manager



**Brian Watkins**

Director of L&D



**Jeff Carpenter**

Principal



### Strategic Opportunity:

How do leading companies engage learners and make learning fun? How do we go beyond the formal, traditional training event to providing performance support through gaming?

The purpose of this roundtable panel discussion is to share how various companies are implementing innovative gaming methods as a means of performance support.

### Discussion Points:

To help guide the roundtable panel discussion, our facilitator will cover some or all of the following:

1. How do you envision gamification in your learning solutions, for both traditional e-learning and mobile solutions?
2. What was leadership's reaction when proposed gamification as a way to learn?
3. What are likely cultural hurdles encounter with gaming and tips for overcoming them?
4. What learner reaction can be expected?
5. Were you able to measure behavioral changes in your learners as a result of the game? How did you do this?
6. Did you have any analytics tied to your game? What do you think analytics can tell you about your learners?

**BigData in Human Resources: Opportunities for Talent Development**  
3:15 p.m.



**Kent Barnett**

Founder & CEO



**Leah Chiles**

Sr. Manager,  
Foundational  
Development &  
Learning Effectiveness



**Bob Danna**

Director



**Kery Mortenson**

Sr. Manager Training  
Effectiveness



### Strategic Opportunity:

As an industry, we have struggled for years to connect learning to business results and use the volumes of data collected by our companies to direct talent development.

In February 2013, Josh Bersin posted on Forbes.com, "[Big Data in Human Resources: Talent Analytics Comes of Age](#)" which explained ...

*Gartner expects the market for BigData and analytics to generate \$3.7 Trillion in products and services and generate 4.4 million new jobs by 2015. While most of the talk is about applying BigData to marketing and consumer businesses, there is an even bigger opportunity to apply BigData to Human Resources. (We call it Talent Analytics.)*

This roundtable panel discussion is an opportunity for learning and talent development leaders to learn the basic concepts of BigData and become verbally fluent regarding the benefits for the learning function with emerging trends.

### Discussion Points:

To help guide the roundtable panel discussion, our facilitator will cover some or all of the following:

1. Provide a brief overview of any BigData application for HR.
2. How well do organizations truly understand what drives performance among their workforce?
3. Data Tells the Story ... BigData Tells a Story, but how do we listen?
4. Explore how to leverage BigData in HR.

Learn about ELE Enterprise Members' Talent Analytics models (e.g., Bersin by Deloitte, KnowledgeAdvisors, etc.).



# 3<sup>rd</sup> Annual SE-WI Learning & Talent Development Leaders Conference

**WHEN:** Thursday, May 2, 2013, 8:00 am – 7:00 pm  
**WHERE:** Harley-Davidson Museum® 400 W Canal St Milwaukee, WI 53201  
**WHO:** Open to All Learning & Talent Development Managers and Executives



Time	Room	Thursday, May 2, 2013	Learning & Line Leaders
7:30 - 8:15 a.m.		Registration & Continental Breakfast	
8:15 - 8:30	Rumble	Welcome / Opening Remarks	Dirk Tussing & Al Hazle
8:30 - 9:15	Rumble	<b>Unleashing Workforce Potential @ Harley-Davidson</b>	Matt Levatich, President & COO at H-D Motor Co.
9:25 – 10:10		<b>Leadership Development Strategies for Unleashing Workforce Potential</b>	Ann Garvey, Deloitte; Angie Zeigler, Harley-Davidson; John Pandl, Froedtert; Cindy Seffair, United Airlines; & Randy Plunkett, Military.com
10:10 - 10:30		Networking Break	
10:30 - 11:30	Rumble	<b>Leaders of the Future: Innovative Leadership Development Roundtable Panel</b>	Joe Knytych, BCBS; EJ Daniels, Brady; Tony Rutigliano, Caliper; Rebecca Sassen, Vi; & Michelle Burke, KeHE
	Peace	<b>Unlocking the Potential of Informal, Social, and Experiential Learning</b>	Marty Rosenheck, Cognitive Advisors
	Flame	<b>Veterans Fueling Corporate Talent Opportunities for Unleashing Workforce Potential Roundtable Panel</b>	Frank Anderson, Bellevue; Randy Plunkett, Military.com; Tom Reilly, CompTIA; Phil Mondrowski, Bank of America
	Bolt	<b>Quality Training Best Practices for Continuous Improvement</b>	Libby White, BCBS; Angela McKeirnan, U.S. Cellular; Lorne Hamilton, Intrepid & Kery Mortenson, Baxter
11:40 am – 12:50 pm	Rumble	<b>Networking Lunch: Knowledge Café</b>	
1:00 - 1:45	Rumble	<b>High-Impact Leadership Development and Insights on Developing Global Leaders</b>	Bob Danna, Bersin by Deloitte
2:00 - 3:00	Rumble	<b>Strategic Performance Support: Is It Possible and How Do You Measure It?</b>	Bob Mosher, Ontuitive
	Peace	<b>Continuous Improvement L&amp;D Strategies Roundtable Panel</b>	Thomas Samuel, Harley-Davidson; Chuck Adams, Aon; Lisa Schumacher, CAEL; & Trina Moskalik, U of P
	Flame	<b>Competency-based Adaptive Training Strategies Roundtable Panel</b>	Ryan Meyer, TIER1; Wendy Fencel, Heidricks; Laci Loew & Michelle Burke, KeHE
	Bolt	<b>Improving Talent Management through the Use of Simulation Roundtable Panel</b>	Carmela Richeson, Sears; Kathy Larson, The Regis Co. Angela Dresen & Suzanne Sherry, Johnson Controls
3:00 - 3:15		Networking Break	
3:15 - 4:15	Rumble	<b>Rolling-out Global Learning Opportunities: Consistently and Locally Adaptable</b>	Timothy Ahrens, Kohler; Adrienne Guerrero, Aon Peter Grassl, CIGNA & Mike Quinlan
	Peace	<b>Unleashing Potential Through Coaching &amp; Teams Roundtable Panel</b>	Dan Ahern, BPI, Judy Braun, Heidricks; Jane Dowd, CAP; Mary Jo Burfeind, BCBS
	Flame	<b>Exploring Digital Performance Support &amp; Learning Through Games Roundtable Panel</b>	Roger Turnquist, Moderator; Paula Kalous, AbbVie; Brian Watkins, Sears; Jeff Carpenter, Caveo Learning
	Bolt	<b>Big Data in Human Resources: Opportunities for Talent Development</b>	Kent Barnett, KnowledgeAdvisors; Leah Chiles, Grainger Bob Danna, Bersin by Deloitte; Kery Mortenson, Baxter
4:30 - 5:00	Rumble	<b>Today's Top Continuous Learning Influencers (Open Mic): Applying What We Learn Today, Tomorrow</b>	Dirk Tussing
5:00 - 7:00 p.m.		Executive Networking, Caveo Learning Wis. Beer Tasting Reception & wander H-D Museum until 8 p.m.	

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