

Recap Notes and Takeaways

Planning for the Inevitable Pivots—How L&D Prepares for Whatever 2021 Throws Our Way

Learning Lab facilitated by Vantage Partners
Winter 2021 | February 23, 2021

Thank you to all who participated in our Winter 2021 Learning Lab on February 23 and contributed to our scenario planning exercise around “Planning for the Inevitable Pivots—How L&D Prepares for Whatever 2021 Throws Our Way.” While we opened and closed creating a collective picture of our expectations for the year, our intent overall was not to predict, but to anticipate and prepare for what may come. We shared perspectives around the implications of four possible scenarios and how we might mitigate their worst impacts and make the most of the opportunities they present.

Vantage Partners will continue to share insights on the evolving, and pivotal, role of Learning and Development leaders as we help our organizations and people navigate through disruption and uncertainty and adapt in 2021’s emerging “new normal.” Toward that end, our next Learning Lab facilitated by Vantage Partners reconvenes on Tuesday, June 8, 2021, from 11 a.m. to 12:30 p.m. EDT. Niamh Sproul, head of L&D at Geller & Company, and Vantage’s Gabriella Salvatore will lead us as we discuss “Mid-Course Corrections: How Learning Leaders Manage Difficult Conversations to Align Productively with the Business.” We hope you will join us again then.

— Danny Ertel, Partner

2021 in a Word: What Do Learning Leaders Expect?



Welcome and Introductions

Introduction: 2021 Scenario Planning in the L&D Context

Presented by Danny Ertel
Partner, Vantage Partners

A tale of agility and fortitude, L&D:

- Pivoted to virtual and engaged anxious learners.
- Helped the business stay engaged with customers, distributors, and suppliers, remotely.
- Recognized the need for investments in mental health and self-care.
- Doubled down on developing organizational resilience.

What comes next?

- Headcount, budgets, and the ability to commit resources will be impacted by an economic downturn.
- Some business models will be permanently disrupted, but which, and how?
- What will work look like, domestically and across the globe, as the pandemic starts to recede?
- How will civil society and body politic respond, in the US and elsewhere?
- How do we support the multiple generations in our workforce and their different needs?

2020


2021

2022

Scenario planning (not predicting) to prepare for change

1 Define the current state and environment

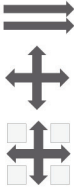
- Define the current state situation
 - What is the external strategy?
 - What is our internal strategy and capabilities?
 - What are the issues at hand?
- Define what the environment looks like
 - What are the key stakeholder groups (internal and external) that make up the ecosystem?
 - What are their different interests?



The process starts with an understanding of the situation and the environment. Who are the stakeholders, what are the competing priorities, where are the possible land mines?

2 Define key variables and create scenarios


- Identify driving forces
 - What external factors are influencing this change?
 - What trends, policies, and market changes impact this transition?
- Identify key variables
 - What, if any, are the predetermined elements? What are the uncertainties?
 - Which are more likely versus less likely to occur?
- Develop plausible scenarios
 - What might the future look like? What are the possible extremes and where might we land in-between?
 - What might cause minimal risk or a strategic shift?



The analysis of possible variables requires an understanding of how L&D interacts with other functions and business units, and what internal and external factors shape L&D's work and the challenges it must overcome.

3 Conduct assessment and testing to refine scenarios

- Assess scenarios based on key variables
 - Map scenarios or conduct a criteria-based assessment
 - If we can influence the change, identify best case vs. worst case scenarios
- Determine which scenarios to focus on based on
 - Degree of impact and certainty
 - Association to drivers for our business
 - Knowledge of early indicators
 - Testing with input from key stakeholders



The possible variables are analyzed for impact and the many possible scenarios for relevance and utility to the planning effort.

4 Define implications and options

- Define implications
 - What does each scenario mean for us? What degree of change or impact might we experience?
 - Are there different implications for the short term and long term?
 - What capabilities do we have? What will we need to invest in?
- Define options
 - What might we do to prepare for each scenario?
 - What choices can we make upfront and how might this impact what happens in the future?

- If the variables depend on the actions of others, war gaming can help us understand the range of competitive responses to future scenarios.
- If the variables depend largely on our own choices, cost-benefit analysis and decision trees can help us invest wisely.
- If the variables are macro/environmental conditions, contingency analysis can help us manage risks and seize opportunities.

5 Define competencies, interests, and likely reactions, and develop recommended strategy

- Define competencies
 - Who are we?
 - What are we good at? What capabilities that we can leverage?
- Prioritize our key interests
 - What is our vision? What are our objectives?
 - How do we want to grow or evolve our business?
- Assess stakeholder reactions
 - What are different stakeholders doing in anticipation?
 - What do we expect them to do in response?

Based on the scenarios, our competencies, interests/vision, and the likely reactions, develop and align around a recommended strategy

- The analysis of the scenarios then enables more effective planning:
- What are the “dominant” strategies — worth pursuing regardless of the scenario?
 - What are some capabilities we should build “ahead of need” — which we would not regret having built if they turn out not to have been critical

How L&D Can Leverage Scenario Planning

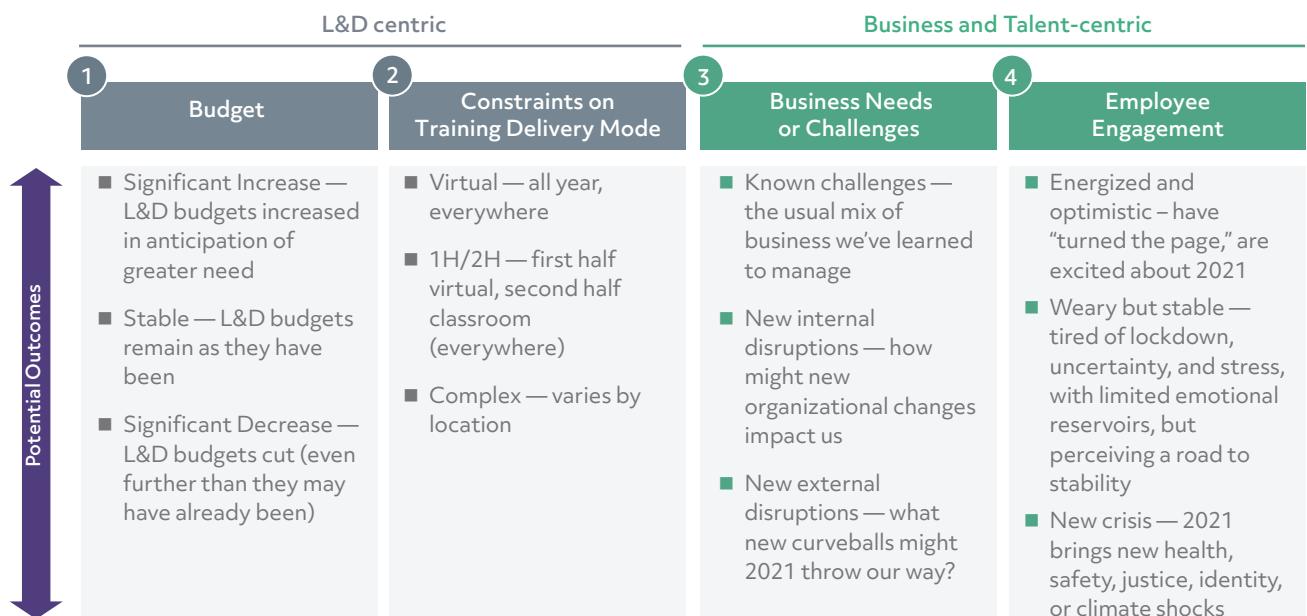
In early 2021, Vantage Partners’ training services team identified four variables—two very L&D centric, and two related to the business at large—that could significantly alter the status quo for learning groups. We then whittled 81 permutations down to four scenarios we thought would make for interesting and useful discussions and stretch our thinking about “what if?”

Participants in our February 23 Learning Lab divided into four breakout groups, with each group taking a scenario and exploring what we’d need to mitigate, optimize, or put in place if that particular scenario comes to pass.



| SCENARIO # | BUDGET | DELIVERY MODE | BUSINESS NEEDS | EMPLOYEE ENGAGEMENT |
|------------|----------|---------------------------|----------------------|----------------------|
| 1 | Increase | All virtual | Known challenges | Wary but stable |
| 2 | Increase | All virtual | Known challenges | New crisis |
| 3 | Increase | All virtual | Known challenges | Energized/optimistic |
| 4 | Increase | All virtual | Internal disruptions | Wary but stable |
| 5 | Increase | All virtual | Internal disruptions | New crisis |
| 6 | Increase | All virtual | Internal disruptions | Energized/optimistic |
| 7 | Increase | All virtual | External disruptions | Wary but stable |
| 8 | Increase | All virtual | External disruptions | New crisis |
| 9 | Increase | All virtual | External disruptions | Energized/optimistic |
| 10 | Stable | 1H Virtual / 2H classroom | Internal disruptions | Wary but stable |
| 11 | Stable | 1H Virtual / 2H classroom | Internal disruptions | New crisis |
| 12 | Stable | 1H Virtual / 2H classroom | Internal disruptions | Energized/optimistic |
| 13 | Stable | 1H Virtual / 2H classroom | External disruptions | Wary but stable |
| 14 | Stable | 1H Virtual / 2H classroom | External disruptions | New crisis |
| 15 | Stable | All virtual | External disruptions | Energized/optimistic |
| 16 | Stable | All virtual | Known challenges | Wary but stable |
| 17 | Stable | All virtual | Known challenges | New crisis |
| 18 | Stable | Complex | Known challenges | Energized/optimistic |
| 19 | Stable | Complex | Known challenges | Wary but stable |
| 20 | Increase | Complex | Known challenges | New crisis |
| 21 | Decrease | Complex | Known challenges | Energized/optimistic |
| 22 | Decrease | Complex | Known challenges | Wary but stable |
| 23 | Decrease | Complex | Known challenges | New crisis |
| 24 | Decrease | Complex | Known challenges | Energized/optimistic |
| 25 | Decrease | Complex | External disruptions | Energized/optimistic |
| 26 | Increase | Complex | External disruptions | Energized/optimistic |
| 27 | Increase | Complex | External disruptions | New crisis |
| 28 | Increase | 1H Virtual / 2H classroom | External disruptions | New crisis |
| 29 | Increase | 1H Virtual / 2H classroom | External disruptions | Energized/optimistic |
| 30 | Increase | 1H Virtual / 2H classroom | External disruptions | Wary but stable |
| 31 | Increase | 1H Virtual / 2H classroom | Known challenges | New crisis |
| 32 | Increase | 1H Virtual / 2H classroom | Known challenges | New crisis |
| 33 | Decrease | 1H Virtual / 2H classroom | External disruptions | Energized/optimistic |
| 34 | Decrease | 1H Virtual / 2H classroom | External disruptions | Wary but stable |
| 35 | Decrease | 1H Virtual / 2H classroom | External disruptions | New crisis |
| 36 | Decrease | 1H Virtual / 2H classroom | External disruptions | Energized/optimistic |
| 37 | Decrease | 1H Virtual / 2H classroom | External disruptions | Wary but stable |
| 38 | Decrease | 1H Virtual / 2H classroom | External disruptions | New crisis |
| 39 | Stable | 1H Virtual / 2H classroom | External disruptions | Energized/optimistic |
| 40 | Decrease | 1H Virtual / 2H classroom | External disruptions | Wary but stable |
| 41 | Decrease | 1H Virtual / 2H classroom | External disruptions | New crisis |
| 42 | Decrease | 1H Virtual / 2H classroom | Internal disruptions | Energized/optimistic |
| 43 | Decrease | All virtual | Internal disruptions | Wary but stable |
| 44 | Decrease | All virtual | Internal disruptions | New crisis |
| 45 | Stable | All virtual | Internal disruptions | Energized/optimistic |
| 46 | Stable | All virtual | Internal disruptions | Wary but stable |
| 47 | Stable | All virtual | Internal disruptions | New crisis |
| 48 | Stable | Complex | Internal disruptions | Energized/optimistic |
| 49 | Stable | Complex | Internal disruptions | Wary but stable |
| 50 | Stable | Complex | Internal disruptions | Wary but stable |
| 51 | Stable | Complex | Internal disruptions | New crisis |
| 52 | Stable | Complex | Internal disruptions | Energized/optimistic |
| 53 | Stable | Complex | Internal disruptions | Wary but stable |
| 54 | Stable | Complex | Internal disruptions | New crisis |
| 55 | Stable | Complex | Internal disruptions | Energized/optimistic |
| 56 | Stable | Complex | Internal disruptions | Wary but stable |
| 57 | Stable | Complex | Known challenges | New crisis |
| 58 | Stable | Complex | Known challenges | Energized/optimistic |
| 59 | Stable | Complex | Known challenges | Wary but stable |
| 60 | Stable | Complex | Known challenges | New crisis |
| 61 | Decrease | All virtual | Known challenges | Energized/optimistic |
| 62 | Decrease | All virtual | Known challenges | Wary but stable |
| 63 | Decrease | All virtual | Known challenges | New crisis |
| 64 | Decrease | All virtual | Known challenges | Energized/optimistic |
| 65 | Decrease | All virtual | Known challenges | Wary but stable |
| 66 | Decrease | All virtual | External disruptions | New crisis |
| 67 | Decrease | All virtual | External disruptions | Energized/optimistic |
| 68 | Stable | Complex | External disruptions | Wary but stable |
| 69 | Stable | Complex | External disruptions | New crisis |
| 70 | Stable | Complex | Known challenges | Energized/optimistic |
| 71 | Stable | Complex | Known challenges | Wary but stable |
| 72 | Stable | Complex | Internal disruptions | New crisis |
| 73 | Stable | Complex | Internal disruptions | Energized/optimistic |
| 74 | Stable | Complex | Internal disruptions | Wary but stable |
| 75 | Decrease | Complex | Internal disruptions | New crisis |
| 76 | Decrease | Complex | Internal disruptions | Energized/optimistic |
| 77 | Decrease | Complex | External disruptions | Wary but stable |
| 78 | Decrease | Complex | External disruptions | New crisis |
| 79 | Decrease | All virtual | External disruptions | Energized/optimistic |
| 80 | Decrease | All virtual | External disruptions | Wary but stable |
| 81 | Decrease | All virtual | External disruptions | Wary but stable |

Two variables affecting the L&D organization directly and two describing the business at large



Proposed L&D planning scenarios for 2021 through early 2022

| SCENARIO | VARIABLES | | | | DESCRIPTION | IMPLICATIONS |
|----------------------------------|-----------|-------------|---|------------|---|--|
| | BUDGET | DELIVERY | BUSINESS | EMPLOYEES | | |
| I. Even More with less | Decrease | All Virtual | External (Key market undermined by tech disruption) | Weary | Customers need answers, supplier relationships threatened, revenue is at risk | Need for knowledge and capabilities spikes, but limited resources (including emotional reserves) available to address major business challenge |
| II. Change and Change Again | Stable | 1H/2H | Known | New crisis | New social/civic crisis erupts | Our plans for an orderly transition to normalcy are disrupted |
| III. Uncertainty Everywhere | Stable | Complex | Internal (company undergoes major reorg) | Weary | A reorganization, and differences across the globe complicates what we do and how | Everything is in flux, except for resources and patience, which are in short supply |
| IV. Careful What You Wish For | Increase | Complex | External (Regulatory shift requires major process and strategy shifts) | New crisis | We anticipated increased needs, but how do we deal with a double whammy? | We have the resources, but how do we cope with the complexity and the new disruptions |

Breakout Discussions

Group 1 Readout: Even More with Less

| SCENARIO | VARIABLES | | | | DESCRIPTION | IMPLICATIONS |
|---------------------------|-----------|-------------|--|-----------|---|--|
| | BUDGET | DELIVERY | BUSINESS | EMPLOYEES | | |
| I. Even More with less | Decrease | All Virtual | External (Key market undermined by tech disruption) | Weary | Customers need answers, supplier relationships threatened, revenue is at risk | Need for knowledge and capabilities spikes, but limited resources (including emotional reserves) available to address major business challenge |

Employees' attention is elsewhere, focused on D&I and business transformation. Plus, employees are sick of Zoom, but also miss personal connections.

How to prevent or mitigate the worst aspects of this scenario?

- Ensure we are focusing on the right topics given limited attention.
- Look for additional resources if required.
- Break learning into smaller components to reduce weariness.
- Partner with IT to head off challenges (equipment, cameras, etc.).
- Monitor budget challenges associated with newly required technology.

What can we do to capitalize on the opportunities it presents?

- Leverage microlearning—can produce and deliver much more quickly.
- Build capabilities to create content more quickly—long-term benefit.
- Leverage internal and external expert advice to help manage challenges.
- Empower businesses to take ownership—give them the tools to succeed. Support them in development and delivery of content.

What do we need to make this work?

- People understand financial constraints—trust them to manage their budget!
- Continue to be agile and creative in our approach.
- Bring in new internal experts to meet new business challenges without exacerbating budget.



Group 2 Readout: Change and Change Again

| SCENARIO | VARIABLES | | | | DESCRIPTION | IMPLICATIONS |
|--------------------------------|-----------|----------|----------|------------|--------------------------------|---|
| | BUDGET | DELIVERY | BUSINESS | EMPLOYEES | | |
| II. Change and Change Again | Stable | 1H/2H | Known | New crisis | New social/civic crisis erupts | Our plans for an orderly transition to normalcy are disrupted |

How to prevent or mitigate the worst aspects of this scenario?

- Revisit, reestablish the “norms” we’ve established over the last year.
- Establish quick, clear communication vehicles that are two-channel. Personnel hear senior leadership; senior leaders hear personnel.
- Maintain peer-to-peer networking opportunities—in a variety of ways (i.e., anticipate Zoom fatigue).
- Virtual learning should now be embedded in the organization.
- If we take delivery out of the equation, the business challenges, relationship challenges, and capability challenges remain priority. Modality is second to all of that.

What can we do to capitalize on the opportunities it presents?

- Resilience and best practice reinforcement. Remind folks of personal wellness and mental health.

- Pause. Take the moment to question how we might do things differently.
- Celebrate wins to remind teams that there is another side of crises.
- Remember to acknowledge some of the benefits of remote work. Often, that yields more participants in more trainings.
- Challenge your workforce to reframe the “crisis” in their own heads (e.g., building new tools and establishing small leadership forums).
- Engaging our audiences and personalizing it can be a game changer.

What do we need to make this work?

- Employee engagement. Figuring out how to refocus head space and planning around fatigue. What support are personnel looking for?
- Senior leadership is going through the same challenges with a different scope. Empower and enable them to take on new crises as they arise—especially now that senior leaders are more directly involved in employee concerns.
- A big answer from 2020 is that “We Can’t Know.” So, keep trainings short and articulate beforehand the feedback we’ll be asking for after the trainings.



Group 3 Readout: Uncertainty Everywhere

| SCENARIO | VARIABLES | | | | DESCRIPTION | IMPLICATIONS |
|--------------------------------|-----------|----------|--|-----------|---|---|
| | BUDGET | DELIVERY | BUSINESS | EMPLOYEES | | |
| III. Uncertainty Everywhere | Stable | Complex | Internal (company undergoes major reorg) | Weary | A reorganization, and differences across the globe complicates what we do and how | Everything is in flux, except for resources and patience, which are in short supply |

How to prevent or mitigate the worst aspects of this scenario?

- Pacing training (how often and what order).
- Analyze what training is needed.
- Think outside of box (vs. just training).
- Dialogue—people want connection. Start with it, end with it, and have a Q&A in middle.
- Give reskilling sufficient time. Reskill in consumable chunks.
- Change up the delivery mix.
- Social justice—don't say one thing, then fail to take action.

What can we do to capitalize on the opportunities it presents?

- Learning can't exist in a vacuum, but must be integrated into talent management and the business. This is an opportunity to lean into that and to support an integrated and holistic view.
- Understand that our families are part of our work—a blended work and home environment
- See the integrated person, recognize the impact beyond the individual. Consider sharing L&D benefits with family members.

What do we need to make this work?

- Avoid just checking the box.
- Acknowledge mental health piece of front line work.
- Add self-care, self-awareness into training. Build in fun, acknowledge stress.
- Need sponsorship of leadership/management. And need them to model behaviors.
- What does success look like? Women are leaving the workforce, need more balance. Remove barriers to D&I.
- Make sure people know it's OK to use the benefits they need.
- Put in place what's needed to offer autonomy, enable self-direction, and support discussion groups.
- Learning experience platform (LXP) vs. learning management system (LMS): Explore technology more suitable for tomorrow.



Group 4 Readout: Careful What You Wish For

| SCENARIO | VARIABLES | | | | DESCRIPTION | IMPLICATIONS |
|-------------------------------|-----------|----------|--|------------|--|---|
| | BUDGET | DELIVERY | BUSINESS | EMPLOYEES | | |
| IV. Careful What You Wish For | Increase | Complex | External (Regulatory shift requires major process and strategy shifts) | New crisis | We anticipated increased needs, but how do we deal with a double whammy? | We have the resources, but how do we cope with the complexity and the new disruptions |

How to prevent or mitigate the worst aspects of this scenario?

- Assess the landscape: What is the crisis and how it is affecting our people? Needs assessment (internal and external). What can we control?
- Engage leadership to understand the target audience and curriculum, and align around an adaptation plan.
- Invest in innovation to strengthen flexibility (IT capabilities) and resilience (mental health resources).

What can we do to capitalize on the opportunities it presents?

- Move resources geographically to optimize (move people to areas where in-person is possible?).
- Leverage external resources in new ways (new and different delivery channel and/or mechanisms, etc.).
- Increase out-of-the-box thinking (both internally regarding how we look at training, and how we enable our organization to think differently).
- Leverage internal resources and expertise within the organization that would not be available prior to these new dynamics.
- Increase use of external resources to enable adaptation of external/internal crises.

What do we need to make this work?

- Buy-in and flexibility from Leadership.
- Clarity of objective.
- Inclusiveness and flexibility to make the new reality work.



Group Reflection: Implications of Scenario Planning

1. Are there any “dominant” strategies that showed up across all the scenarios, and thus may be worth pursuing without knowing just what will happen?

- Engaging leadership in different ways—around social justice, their presence, ensuring resources for mental resilience
- Staying flexible
- Hybrid delivery channels
- L&D stepping up for organizational change
- Racial justice—actually making it happen
- Smaller components—breaking up learning into chunks
- More ways to reach people, new ways to coach and engage teams
- Be kind
- L&D perceived as an HR benefit—and a benefit shared beyond the talent pools
- Opportunities to customize learning
- How do we do things that were previously high touch

2. Do any of these scenarios suggest any capabilities we should build “ahead of need”—and how would we feel if we invested in them and then didn’t actually need them?

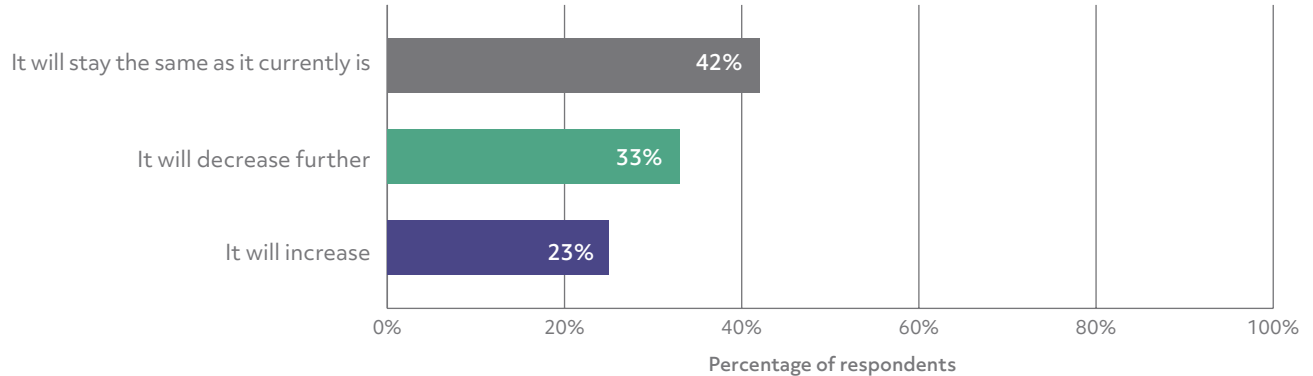
- Ability to archive and record training so all can have a similar experience
- Upskilling on learning experience platforms, so we do not need to make learning fit in Zoom or Hangouts, and can better capture behaviors and experiences in learning
- Continue building capabilities in varied modalities
- Expand capacity and access to mental health care
- Improve instructional design skills, learning technology
- Better collaboration between L&D and Strategy
- Leadership buy-in and leaning in
- Borrow from marketing: use “campaigns” for nudges and spaced learning

“Take the first few steps along a path. Don’t plan it do much. Then reflect on what you have learned. Put a better plan in place at an outline level. Park the plan until needed and then you are one step ahead at low cost.”

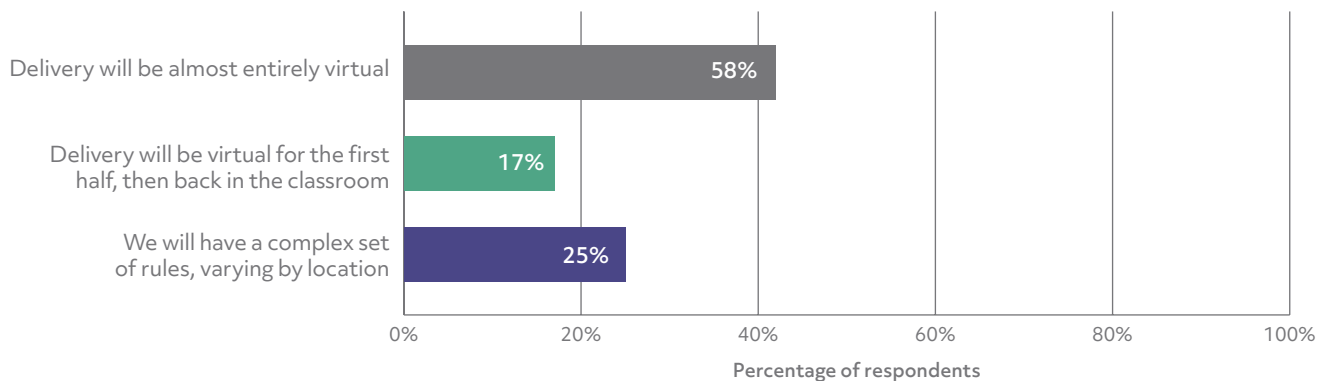
Closing Poll: What Are Our Predictions?

Scenario planning is not about predicting the future, but we couldn’t resist, after the discussions, taking the pulse of the group on where each thought these variables might actually land.

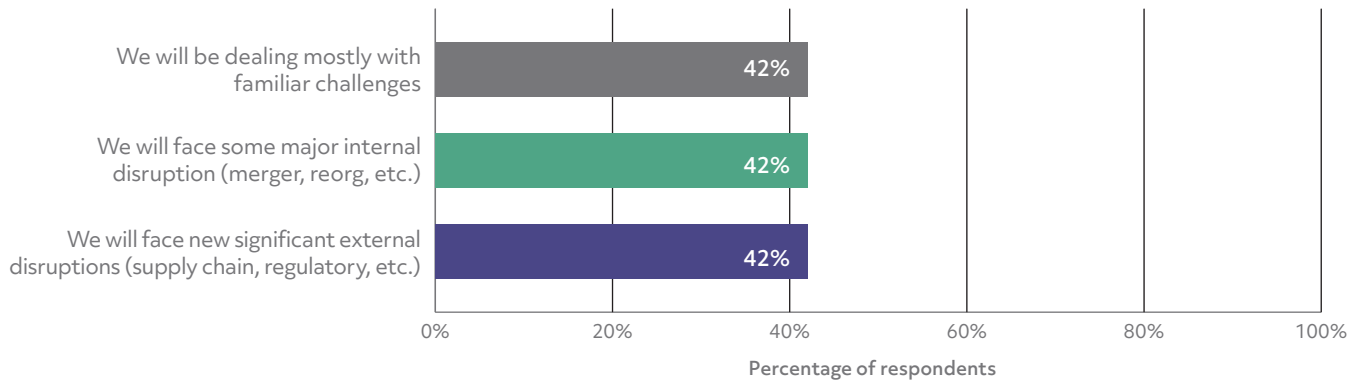
Q1. What is most likely for your training budget for the coming year?



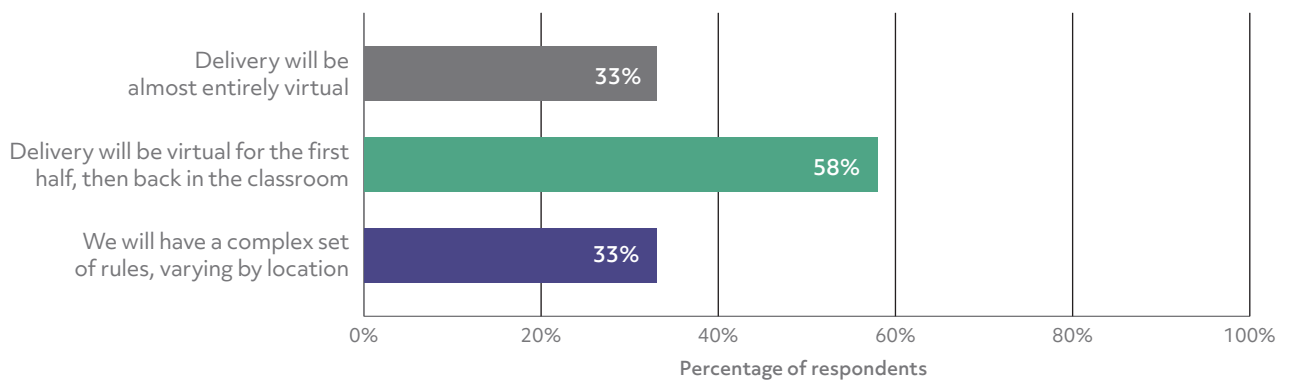
Q2. What is most likely how you will deliver training in the coming year?



Q3. What is most likely true for the business needs L&D will help meet during the coming year? Select all that apply.



Q4. What will most likely be true of employee engagement at your company in the coming year? Select all that apply.



Please plan to join Geller & Co's **NIAMH SPROUL** and Vantage's **GABRIELLA SALVATORE** for our next Learning Lab

MID-COURSE CORRECTIONS
How Learning Leaders Manage Difficult Conversations to Align Productively with the Business

June 8, 2021 11:00-12:30 EST



Gabriella Salvatore



Niamh Sproul