



Building a Learning Culture in Your Firm

Our Agenda

- To develop an appreciation for continuous learning and explore:
 - Creating an environment that embraces continuous formal and informal learning
 - Identifying diverse learning styles and interests
 - Developing a systemized approach to providing your people with the soft skills, business process, and technical support they need

Poll #1

What Is A Learning Environment?

- One that:
 - Values learning and invests the time, money, and resources to prove it
 - Believes in a life-long learning concept (versus “early in life learning”) and models this behavior from the top down
 - Manages the learning function to ensure a variety of learning opportunities are offered all year, to all people in the firm
 - Measures learning functions and processes and hold the leadership team accountable for the firm’s performance in this area

But Why Create a Learning Culture?

- You are in the knowledge business
 - The more you and your people know, the more value you bring to your clients
- The marketplace is changing and evolving at a higher rate than ever before
 - Regulation, competition, technology advances, and more drive change in our organizations
 - Real change management requires learning to assimilate advances and new ideas

More Reasons to Create a Learning Culture

- You have to develop a learning culture to compete
 - All people value personal and professional development to some degree – although not all place the same value on it
 - To be competitive in recruiting and retention, your firm has to move to a culture that values, and invests in, learning
- You have to model learning behavior to expect your people to value learning themselves!

A Word About Individual Motivators

- In their work, all people value:
 - Acknowledgement and respect



- Increased responsibility and challenge
- Flexibility and time off
- Compensation
- Camaraderie and fun
- Personal development
- Each person in your firm values these motivators differently
- In other words, your commitment to a learning culture will be a big “turn on” to some and less so to others
 - It can’t be the only method you use to motivate your team

It Starts With Leadership

- Start with the assignment of learning “ownership” in your firm. Some possible learning roles include:
 - The Executive or Partner Sponsor
 - Makes sure that learning is part of the firm’s mission, vision, values, and core strategies each year
 - Represents learning at the partner table
 - The Learning “Manager”
 - Drives learning initiatives in the practice
 - Responsible for managing all aspects of learning activities – planning, resourcing/delivering, measuring, and reporting
 - The Facilitators
 - Those with specialized knowledge in knowledge transfer and skills development in particular areas – either within your firm or external
 - They work with your Director of Learning to develop the appropriate learning opportunities in a variety of subjects and delivery methods
 - The Learners
 - Initiates and owns their own learning experiences – called “Learner Driven Learning”
 - Practiced in most schools today, the learner shares responsibility for making their own learning happen
 - The Counselors
 - Those who review performance and provide feedback to the Learners
 - They act as career advisors or career managers, help Learners develop personal learning plan goals and a training plan that aligns with firm goals

Modeling Learning

- Your next step is to make sure that you do not have a “do as I say, not as I do” learning system
- Your partners and executive leaders HAVE TO model a life-long learning commitment and be clear that even they can and do learn new things daily



- This isn't just a verbal commitment
- You have to show up at learning functions, pay attention, focus, ask questions, and stay for the entire event
- Your people will take their queues from you!

Why Are We Doing All Of This Anyway?

- We invest in learning to:
 - Transform behavior
 - Enhance performance
 - Expand capacity – increase the number of people who can do certain tasks
 - Increase efficiency
 - Enhance satisfaction and retention
- You'll need both short-term and longer range measures to gauge your effectiveness

Potential Short-term Measures

Longer Range Measures

Hold Learning Owners Accountable

Develop a Firm-Wide Management Matrix

- Create a matrix to provide a “master overview” of all learning options across your various learning types and methods
- Your learning manager will use the matrix to communicate learning options for various staff levels to managers and mentors
 - This will help when developing individual learning plans

Explore Learning Management Systems

Identify Types of Learning in Your Firm

- There are many potential ways to define this – don't be limited by these examples!
- Possible learning types:
 - Soft skills learning
 - Business process learning
 - Business model learning
 - Technical skills learning

Poll #2



Soft Skills Learning Examples

Business Process Learning Examples

Business Model Learning Examples

Technical Skills Learning Examples

Poll #3

When Choosing, Consider Individual Learning Styles

- Traditional styles – most people prefer one of these learning styles *Adapted from:* http://en.wikipedia.org/wiki/Learning_styles
 - **Auditory** – learning by hearing spoken word
 - **Kinesthetic** -- learning by doing and interacting
 - **Visual** -- learning by reading, looking at pictures, maps, illustrations, demonstrations, facial expressions, and body language
 - **Tactile** – learning by writing notes, drawing charts, and pictures
- Ideally, your learning plans will incorporate some of all four
- Other potential learning styles exist and can be identified using various assessment tools including Myers-Briggs Type Indicator (MBTI), DISC, Kolb's Learning Styles Inventory

Build a Learning Roadmap for Each Position

- Each position in your firm should have a learning roadmap that is “required learning” at that level, in that role
- To move into a more senior position, each person will complete their learning roadmap and be able to demonstrate the associated skills and learning that result
- Most firms are most daunted by this step – because it feels like an enormous “nice to have” and hard to rationalize if you don't yet have written job descriptions

But You Can Start Simple!

- For a 1st year staff auditor, the learning roadmap may be:
...

Build Individual Learning Roadmaps

- For each objective on the learning roadmap:
 - Identify the priority
 - Determine the “by when” date



- Identify who will assist the learner and act as the facilitator for each objective
- Define the method by which the learning will occur
- Outline any resources available to the learner in this area
 - Include professional texts, articles, web sites, databases, or manuals that may help them in their learning in each area

Individual Learning Plan

Be Accountable

- The learner “owns” the completion of their individual learning plan
- The learner’s mentor or career advisor should review the status and scheduling with the learner
 - Review the learning objectives during regular check in meetings
 - Set new goals during the annual performance review – or as learning objectives are completed

Next Steps

Poll #4

Thank You!

Resources