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# The Added Value of a Chief Learning Officer to an Organization

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The Added Value of a Chief Learning Officer to an Organization

By

James Von Bramer

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A final project submitted to

The Faculty of  
The Graduate School of Human Resource Development  
of St. John Fisher College in partial satisfaction of the requirements for the degree of  
Master of Science

## Dedication

I dedicate this capstone project to my parents William and Susan VonBramer as well as my significant other Amy Henninger. Their belief in my work and constant encouragement propelled me to accomplish my goal of completing this program. They were the guiding force, as they understood my struggles yet pushed me to see it through to the end.

### Acknowledgements

I would like to take a moment to acknowledge two individuals for their role in the completion of my project. Thank you to the faculty of the St. John Fisher Human Resource Development Program. I worked for quite awhile to complete the capstone project and ultimately complete the program successfully. Dr. Tim Franz was able to keep in contact with me as I took my time to complete the program requirements. I will be forever grateful for his constant and influential communications. Dr. Seth Silver was instrumental in providing much needed encouragement, feedback, reminders and overall advisement. Without his direction and leadership, the completion of my capstone project would not have been possible.

Master Signature Page

Dr. Seth Silver, Advisor

Signature: \_\_\_\_\_

Dr. Tim Franz, Faculty Reader

Signature: \_\_\_\_\_

Dan McCarthy, Reader

Signature: \_\_\_\_\_

Table of Contents

Chapter 1 ..... 1

    Overview of Problem..... 1

    Problem Statement..... 2

    Purpose of the Study..... 3

    Research Questions..... 3

    Significance of the Study..... 3

    Methodology..... 3

    Definition of Key Terms..... 4

Chapter 2..... 6

    Literature Review..... 6

Chapter 3..... 33

    Implications..... 34

    Considerations for Employers..... 36

    Conclusion..... 38

References..... 41

## Chapter 1

### *Overview of Problem*

Over the past decade, many companies have begun to focus on organizational learning and how it directly influences organizational effectiveness. Organizations have shifted from traditional methods of training and development such as classroom lectures and broad based training methods, to technology based learning programs and building integrated learning environments. These new programs and environments are dynamic and equipped to adapt to changes. As a result, more organizations are beginning to understand the role of organizational learning from a global perspective and how it affects productivity, employee retention and overall organizational effectiveness. Organizational effectiveness is a measure of an employers' ability to achieve their goals (The Bureau of National Affairs, 2006). Human Resource Vice Presidents and similarly titled executives have been a guiding factor in enabling organizational effectiveness and learning. These professionals have continued to develop new skills, responsibilities and competencies as organizational strategies and visions have evolved.

Schwandt and Marquardt (2000) describe learning organizations in a world that is constantly and rapidly changing. The long-term success of organizations seems to rely on understanding their learning patterns in response to internal and external changes. To assume greater control of their own actions, organizations learn to react to changes in their environment and how they come to question their own processes and procedures. According to Schwandt and Marquardt, literature on organizational theory and practices has been increasingly concerned with the ability of organizations to learn to cope with the escalating rate of change and complexity of organizational environments. One way that

organizations can proactively manage this change and better prepare for the future is by employing a Chief Learning Officer.

A Chief Learning Officer is typically a corporate executive in charge of employee training, education and learning (Lustig, 2003). Chief Learning Officers encourage their employers to investigate what competencies will make their workforce successful and then align development programs with their strategic objectives to internal and external changes. They also create an environment in which learning is readily available to employees and try to determine what return on investment can be measured after learning occurs (Jossi, 1998). A vital responsibility of a Chief Learning Officer is building the foundation of an organization's learning culture, as well as continuously modifying the programs to stay ahead of the constantly changing business learning environment.

#### *Problem Statement*

Organizations have continued to seek out new ways to improve the development, training and retention of their employees in an effort to remain competitive in a dynamic market. Over the past two decades, organizational learning has become a critical focus for some organizations in their effort to adapt to change and remain competitive. With the emergence of the "C-level" title for various leaders of organization functions, the Human Resource Development field has created a new title, Chief Learning Officer, or CLO. However, there is very little literature or research that discusses the roles, competencies, strategies, and accomplishments as well as challenges that a Chief Learning Officer faces while working within an organization. Therefore, there is a need for a literature review that examines the role of a Chief Learning Officer and the added value an organization receives by having a CLO.

### *Purpose of the Study*

The purpose of this literature review is to analyze and define the roles, competencies and responsibilities of a Chief Learning Officer as well as determine if a CLO has a significant impact on organizational learning and organizational effectiveness.

### *Research Questions*

1. What is a Chief Learning Officer?
2. How do organizations use CLOs?
3. What is the impact of a CLO on an organization's effectiveness?
4. What challenges do CLOs face?
5. What is the career path of a CLO and how might a human resource professional be developed for a CLO role?

### *Significance of the Study*

The significance of the study is to understand if the creation of a CLO position will positively affect an organization's learning goals, strategies and ultimately its effectiveness. Human Resource Development professionals, Human Resource academics, Chief Executive Officers and Boards of Directors will all directly benefit from this literature review, as it will provide them with more insight on the vital importance of becoming a learning organization, and how a CLO can make this happen.

### *Methodology*

In order to address the earlier noted research questions, literature is reviewed discussing the roles, competencies, visions and strategies of CLO's and their impact on an organization. Specifically, reviewing the literature helps to understand fully the evolution of the Chief Learning Officer role and determine if it positively influences

organizational learning and business objectives. The findings of this literature review serve to clarify the role of a Chief Learning Officer and present the added value that these new “Chief’s” bring to an organization.

*Definition of Key Terms*

**CLO**: A Chief Learning Officer is a corporate officer in charge of employee training, education and learning (Elkeles & Phillips, 2007).

**CEO**: A Chief Executive Officer is the highest-ranking corporate officer, administrator, corporate administrator, executive, or executive officer, in charge of total management of a corporation, company, organization or agency (Elkeles & Phillips, 2007).

**COO**: A Chief Operating Officer is one of the highest ranking members of an organization, monitoring the daily operations of the company and reporting to the Board of Directors. The COO is usually an executive or senior vice president (Elkeles & Phillips, 2007).

**Development**: Development comprises any long-term learning intervention that is intended to evoke individual insight and/or build creativity (Rothwell & Stredl, 2000).

**Emotional Intelligence**: Describes a concept that involves the ability, capacity, skill, self-perceived ability, to identify, assess, and manage the emotions of one’s self, of others, and of groups (Goleman, 1995).

**Explicit Knowledge**: Human knowledge that can be articulated in formal language including grammatical statements, mathematical expressions, specifications, manuals which can be transmitted across individuals formally and easily (Nonaka & Takeuchi, 1995).

**Knowledge Management:** The process and methods of collecting, organizing, and disseminating intellectual capital (Rothwell & Stredl, 2000).

**Learning Organization:** Organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to learn together (Peter Senge, 1990).

**Organization Development:** Long-term change efforts directed toward individuals, groups, and organizations; it is intended to change or improve decision-making, problem-solving, and group or organizational culture (Rothwell & Stredl, 2000).

**Organizational Learning:** The way firms build, supplement, and organize knowledge and routines around their activities and within their cultures and adapt and develop organizational efficiency by improving the use of the broad skills of their workforces (Nonaka & Takeuchi, 1995).

**Performance:** The outcome of learning and can be viewed at three levels including individual, group and organization (Elkeles & Phillips, 2007).

**Tacit Knowledge:** Human knowledge that is difficult to articulate with formal language as it is personal knowledge embedded in individual experience and involves intangible factors such as personal belief, perspective, and the value system (Nonaka & Takeuchi, 1995).

**Training:** A short-term learning objective that is intended to build on individual knowledge, skills, and attitudes to meet present or future work requirements (Rothwell & Stredl, 2000).

## Chapter Two

### Rationale for Becoming a Learning Organization

*“Fasten your seatbelts. The pace of change in the 21<sup>st</sup> century will be a blur. The world of work will continue to be transformed by the twin forces of technology and globalization. Organizations will become more virtual than physical. Workers will be more closely linked to customers across the country than to co-workers across the hall. Products and services will have ever-shorter shelf-lives.*

*As a result, only organizations that can adapt quickly and continuously will be able to survive and succeed in the new millennium. The corollary is also true. Organizations which cannot learn to adapt more quickly and constantly than the changes and chaos of the surrounding environment will become irrelevant, if not extinct.*

*This ability to adapt and innovate with increasing speed requires a new way of organizational thinking, acting, and, most importantly, learning. Only by organizationwide learning will companies have the speed, innovation, and quality essential to respond with competence to the ever-growing expectations of their customers. Simply put, organizational learning itself must become a core competency to compete” (Schwandt & Marquardt, 2000.)*

*Bette Stanley Beene  
President and Chief Executive Officer  
United Way of America*

One of the primary roles of a CLO is to foster development of a learning organization. Organizational life and structure continue to evolve as the economy changes, globalization grows and technology improves. Organizations around the world are being forced to transform in order to adapt, survive, and succeed. These transformations include external elements including adapting products, activities or structures as well as internal elements such as integration of values, visions, purpose and human capital philosophies. This evolution requires organizations to learn faster or face the reality of not being able to survive (Marquardt, 1999). Learning organizations are able to reinvent themselves and adapt to change proactively when necessary, while non-learning organizations are often reactive in strategy and are unable to catch up or adjust to the changing environment.

Learning needs to occur fast, cheap and effectively in order for organizations to sustain a competitive advantage. Organizations need to be able to identify successes and

failures and learn from these experiences in order to adapt to external changes and integrate internal opportunities for improvement. As individuals and groups within the organization learn from experiences they must begin to take action to improve quality, processes, products, services, culture and strategy, which will lead to continuous evolution.

A learning organization is able to empower people within and outside the company to learn as they work and utilize technology to optimize both learning and productivity. Some common characteristics of learning organizations include knowledge being continuously transferred, stored and collected by employees. Employees must have continuous access to information and data resources that are important to the company's success. A corporate climate exists that encourages, rewards, and accelerates individual and group learning (Marquardt, 1999). It embraces change and sees adversity such as during a depressed economy, as a perfect learning opportunity to afford the organization a chance to emerge with a greater competitive advantage.

Learning organizations are seeking out leaders that value and understand organizational learning and its importance to the success of today's companies. The leader needs to know how to link learning to business strategy as well as transform the business culture into a learning culture. The leader who has the skill set to meet the learning organization's needs is the Chief Learning Officer.

***Question One: What is a Chief Learning Officer?***

A Chief Learning Officer is a senior executive who has been appointed the task of directing and managing learning, performance improvement, career development, talent management and organizational knowledge functions at the highest level (Elkeles & Phillips, 2007). They lead their respective organizations into the future by constantly managing changing environments, preparing the workforce strategically for changes in technology, gaining knowledge through learning programs as well as maintaining communication with corporate leaders such as the Chief Executive Officer in order to remain a vital part of the organization's vision and future success. There are a number of common competencies that most CLOs possess. However, each set of CLO competencies may be different based on the size of the organization, the scope of their role, the strategy of the company and the willingness of senior management to embrace a CLO's perspective.

**Competencies**

There are certain competencies that most successful Chief Learning Officer should possess:

***1. Link learning to strategy***

The most important competency a Chief Learning Officer should possess is the ability to link learning priorities and initiatives with the strategic direction of the organization as well as the ability to demonstrate that link to corporate management through measurement and evaluation (Levy, 2004). Often in the past, Training Directors, Training Managers or Vice Presidents of Learning and Development did not have direct access to corporate management meetings and discussions regarding company strategy

(Baldwin & Danielson, 2000). In order for a Chief Learning Officer to accomplish his/her goals and contribute to an organization's success, it is essential that he/she have direct input and access to information regarding business strategy and the organization's future direction. Learning objectives, training programs and development initiatives are created in response to company strategy and future direction. It has been shown that if learning strategies and programs are not linked with business strategy, then the learning is often considered unsuccessful, as the actual results do not match the desired results (Elkeles & Phillips, 2007). The CLO must gain the trust of the organization's executive team by implementing successful learning programs and then showing the success by demonstrating the company's return on the investment through business metrics.

## *2. Communication*

A Chief Learning Officer must be a superb communicator, listener and influencer as interpersonal skills and the ability to be influential is critical to the success of a CLO. A CLO must be able to build relationships with senior management, create coalitions and influence business partner's views regarding learning in the organization (Lynch & Sugure, 2006). The value that learning initiatives and programs will bring to an organization has to be clearly communicated, demonstrated and sold to management in order to get the buy-in that a successful program will need. The CLO must challenge the perception of senior management potentially viewing him/her only as a high ranking Human Resources executive and not as a competent, business savvy professional who is considering the best interest of the organization and requires a seat at the board room table. Leadership is not always easy and in some cases the "C" that senior management has given CLOs has not lived up to the "chief" title. Some CLO's are ready to lead their

respected organizations, however, many become frustrated by their inability to influence the culture of the organization and disappointed in the limited access they have to senior management (Masie, 2008). To be successful, a CLO must have a high comfort level with senior managers and boards.

Steve Kerr, CLO of Goldman Sachs and former CLO of General Electric, stated that when he joined Goldman Sachs he had to spend his first few months on the job convincing division heads that he was not there to teach classes or implement typical training programs, rather he was there to talk about business challenges that faced managers so that he could better understand where learning was necessary (Caudron, 2003). Communication and speaking to managers in their own language is crucial in order to gain credibility. Kerr went on to say that CLOs cannot talk in terms of learning models and academic theories because clients do not talk that way. Instead CLOs need to talk about business issues and relate connections of learning solutions to the way managers think in the business world. Kerr uses an interesting car manual metaphor when discussing how to learn to communicate with internal clients. The front of the manual usually discusses technical terminology such as drive trains, manifolds, ABS systems that many people do not understand. He goes on to state that what people do understand is the troubleshooting guide at the back of the manual that describes what might be wrong when the car will not start. He says that CLOs are the troubleshooters of an organization. Like the auto manual, CLOs have to troubleshoot in terms that people understand (Caudron, 2003).

### *3. Leadership*

Research showed another competency that successful CLOs must possess. Leadership is difficult to define but yet is clearly listed as one of the more important competencies a CLO possesses. One definition of leadership provided by Warren Bennis is; “The capacity to create a compelling vision and translate it into action and sustain it. Successful leaders have a vision that other people believe in and treat as their own”. Leadership is an essential competency of any executive, but a CLO is hired to lead the organization down a new and rugged path of learning that includes changing technology, global workforces and lower budgets (Caudron, 2003). CLOs are responsible for providing the roadmap for the organization’s learning strategy and thus improving the bottom line. The Chief Learning Officer must make the correct decisions regarding learning strategy and direction, as well as lead the company to accomplishing overall goals by committing to a course and believing in the successful end result.

Just as important as being a leader is the need for the CLO to develop business unit managers into leaders within the organization. Passing leadership competencies onto management through development programs is a way for an organization to become more aligned.

### *4. Strategic Planning and Development*

Experience in strategic planning and development is another competency a successful CLO possesses. Bill Kline, CLO of Delta Air Lines says, “Number 1: If you want to be strategic, you know the details of your business” (Bonner & Wagner, 2002 pg. 3). The CLO is responsible for strategic planning and development at the highest level and therefore must have prior experience making critical decisions regarding the “big

picture” of an organization. Thinking globally across the enterprise is the responsibility of the CLO while thinking tactically is left to different business units.

Strategic planning can be challenging for a CLO as there is a limit as to what learning can do to the overall performance of the organization. For example, one CLO was hired into a major retail organization and was asked to raise store sales from year to year as well increase staff retention. The CLO had a great deal of influence over the organization and had a seat at the board room table, however, he was let go due to the fact the economy had dropped and the product lines were not up to par (Masie, 2008). This example shows that a Chief Learning Officer does have control over the internal environment of an organization but cannot always control the external environment as it is always changing.

After a program or initiative has been endorsed by top management a CLO must follow through on the promises that were made. The CLO must be a champion and advocate for the programs that are being implemented so that the entire organization believes in the purpose and the organization’s ability to reach its objectives. CLOs can prove their worth by focusing resources on projects and processes that will help their company meet objectives. The areas that a CLO specifically focuses on are varied, for example, a specific area such as leadership development, or a broad focus on multiple aspects of organizational learning such as common human resource development and management themes such as training and development, succession planning, recruitment, retention and career planning (Gnyawali & Grant, 1996). The areas of focus for each Chief Learning Officer will depend on the type of business the organization is as well as the needs and the strategy of the organization.

### *5.) Additional competencies and qualities*

Some additional competencies of CLOs include the ability to articulate the value of learning and human performance improvement to corporate management, the ability to understand the learning and development process, the ability to adapt to new technology, measurement and evaluation techniques including ROI, the ability to identify shared values and corporate culture, the ability to identify needs and the ability to demonstrate how learning has an impact on business performance (Caudron, 2003).

Further, CLOs often possess intangible qualities that contribute to their success. Qualities such as charisma, persuasiveness, business savvy, intellect and the ability to see the “big picture” are characteristics of leaders and visionaries (Rodriguez, 2005). They understand the big picture and can envision the role of learning in that picture. Most CLOs characterize themselves as “big picture people” (Bonner & Wagner, 2002). Another intangible quality a CLO typically displays is a high degree of emotional intelligence. In a leadership role it is critical to understand and empathize with the people in the organization. Anger, stress and volatility can have enormous negative consequences in the workplace including attendance, learning and ability to make decisions (Goleman, 1995). The Officers of the company including the CLO are the examples that shape the attitude and values of the organization. When emotional intelligence is low, a company can crash and burn (Goleman, 1995). Chief Learning Officers must possess a mixture of both hard skills and intangible qualities discussed above.

One of the best ways for a CLO to accomplish corporate strategy is to understand the people in the organization and then create programs to develop successful leaders,

who can then drive the strategy and cultural transformation at the business unit level. A successful Chief Learning Officer must be able to understand the people as well as the strategic goals of the company and then link how the learning function contributes to attaining those goals.

***Question Two: How do organizations use CLOs?***

Organizations use Chief Learning Officers in many different ways depending on the needs of the organization. They are expected to provide learning tools and the means for employees to gain knowledge, which leads to greater productivity, competence, skill and commitment. CLO's drive corporate culture and values throughout a company by integrating learning initiatives and expectations (Packer, 2000). The communication of the learning strategy and vision to management, trainers, and employees is the responsibility of a Chief Learning Officer, as well as recruiting, developing and retaining a competent workforce. However, the learning strategy not only has to be communicated it also has to be aligned with the strategy of the business.

***1.) Navigate an organization through change***

Organizations use CLOs to increase awareness and motivate their workforce to participate in education, training and learning by promoting learning at a time and place that meets the worker's needs and interests. CLO's are also relied upon to help navigate an organization through change or to actually stimulate change. The change may be necessary due to a number of factors including new technology, business initiatives, product offerings, customer needs or globalization. Specifically, a CLO is responsible for responding to or anticipating changes in the business environment by aligning learning objectives and goals with imminent business needs.

An insurance company that is preparing to become a publicly held company is an example of how an organization uses a CLO (Gordon, 2005). The company needs someone to drive the company's culture-change process. The executive group looks for someone who can handle many different responsibilities and manage human resources as

well as the organizational development team. The new CLO transitions the business units to revamp the company's performance management process. In addition to this, the CLO opens up the position to include working on communications with consistent key messages and creating a new learning and development function to build the skills and tools to prepare the company for the tests of public ownership. The success of the programs leads to additional leadership responsibilities including employee relations and recruiting, as well as learning and development (Gordon, 2005). This example shows that a CLO may not have a great amount of responsibility or only have an opportunity to work on a project with limited scope to begin with, however, after the initial success and the trust of executives is earned, the position can open up to an array of responsibilities.

Another way an organization uses a CLO to adapt to change could be when a merger is taking place. For example, a Director of Management and Organization Development was asked to lead training initiatives for two companies that were becoming one based on an acquisition. The company doubled in size and along with the training function, the individual was also asked to lead HR systems improvement such as assessment, succession planning, coaching, and organization development. Based on the new responsibilities, the individual asked for a title change to "Vice President & CLO". After the change in title, the perception was that the CLO was instantly a key contributor to strategic business decisions. The CLO had a license to get involved, and not because people were impressed by the title, but because no one was really sure what the job description of a CLO entailed, which is a reason why the CLO title is so intriguing. The CLO was also asked to help plan and facilitate a strategic planning process involving the CEO and senior executives for a business development group. A "Training Manager"

may not be able to run a strategic planning meeting but a CLO can because senior management is not sure what a CLO is or is not supposed to be doing. Even with the additional freedoms that a CLO title gives an individual, the CLO still needs to deliver the goods, which means that he/she must be able to create learning and performance initiatives that actually demonstrate an effect on the organization's bottom line (Gordon, 2005).

### *2.) Determining strategic needs*

CLOs also need to be extremely focused when attempting to meet the needs of their organization. They are expected to know what initiatives they are going to take on and where and when to consolidate their resources around the area that has the biggest strategic payback.

Boeing hired their CLO who came into the company and then declared that he was not going to have anything to do with organizational learning, training or even performance management (Caudron, 2003). Instead, he focused his resources exclusively on leadership development. By contrast, the CLO of Cisco Systems wanted to keep the sales force up to date in an environment in which new products were being launched every four days, hence, his immediate focus was on establishing an e-learning initiative (Caudron, 2003). These examples illustrate the point that organizations utilize CLOs differently based on strategic needs. A CLO must be fluid and have the ability to see the vision of the company and align learning continually to the changes that are occurring.

### *3.) Generate revenue*

In today's business environment it is not only important to have a Chief Learning Officer who can be a visionary and develop strategic plans as discussed, it is also often

required that he or she is able to generate revenue for the company through learning initiatives (Packer, 2000). This may be accomplished through the creation of a corporate university, development of e-learning programs or executive and leadership development programs. CLOs are typically expected to manage the learning department as a business and show profitability. Profitability will also lead to increased trust of the Chief Learning Officer and the organization's executive team. The ability to generate income or save the company money is one of the main ways a CLO can add value to an organization (Lynch & Sugrue, 2006).

A common pitfall that a CLO should avoid in order to save the company money is falling victim to "flavor of the month" types of programs. Executives have learned through experience or through the sharing of best practices, that just because a certain program worked for one organization does not mean it is a good fit for their organization. Learning initiatives need to be planned according to the needs of the organization, the capabilities of the workforce, the available budget, the company strategy and focus on the area where the company can get the best return on their investment (Elkeles & Phillips, 2007). Organizations need customized programs and initiatives that are based on their situation and their future. Typical training programs are no longer the solutions; companies realize that they need to become learning organizations in order to stay competitive. They need to be leaders in their industries and at they cannot afford to be reactive. This is why CLOs are becoming critical to the success of companies.

#### *4.) Reporting Structures*

There is no standard rule as to whom a Chief Learning Officer reports. Instead, it is based on criteria such as the size of the organization, the importance senior

management places on learning, the strategy of the organization and the CLO's ability to articulate the need to be involved in setting goals and objectives for the company. The CLO title does not automatically imply involvement in strategic decision-making; however, CLOs typically work with senior executives and in most cases have direct contact with the CEO (Baldwin & Danielson, 2000). The contact may be a formal reporting relationship or else an informal communication based upon a particular learning initiative. The closer the alignment with the CEO, the more flexibility a CLO typically has with potential resources. If there is a perceived link between the CEO and the CLO, then the CLO has much more organizational freedom to experiment because the more visible the reporting relationship is with senior management, the more space and opportunity there is for the CLO to try new approaches and initiatives (Baldwin & Danielson, 2000). Resources may be more easily secured and funding may not be a question as the request is being originated from the boardroom.

However, not all CLOs are afforded the opportunity to report directly to the CEO. Chief Learning Officers may report to a human resources executive which may not necessarily limit their influence or capabilities, but it does place the CLO at least one rung down on the organization chart from other C-level roles (Gordon, 2005). That one rung may mean that the CLO does not have direct access to information, goals and strategies regarding the organization. Resources may not be as readily available and the CLO may spend more time trying to acquire support for initiatives and learning objectives. The alignment of learning initiatives and corporate strategy may not be at the forefront of the company's goals. Although the title of CLO implies strategic influence, it is not always the case.

***Question Three: What is the impact of a Chief Learning Officer on an organization's effectiveness?***

The impact a Chief Learning Officer can have on an organization is tremendous; as long as they can overcome the many challenges CLOs face due to the fact they are a relatively new part of the executive management team. A successful CLO can link learning functions to the strategic objectives of the company, which in turn moves the company closer to achieving overall success in terms of profitability, growth, retention and adaptability. Financial success for shareholders, executives and employees is often the goal and mission of a company. However, the added value that a Chief Learning Officer can bring to a company includes improved employee satisfaction, commitment, knowledge, responsiveness, innovation and quality.

By focusing on becoming a learning organization the company can often become more efficient regarding talent management and knowledge management via increased employee retention and recruiting (Elkeles & Phillips, 2007). Experienced employees and talented new hires are better equipped to perform their jobs successfully because they have the opportunity to develop knowledge, skills and abilities through various programs and initiatives that a CLO may put into place. This results in a more efficient, streamlined, focused and driven organization that is better equipped to meet its current and future goals and is therefore more effective.

Another way to show how a Chief Learning Officer creates increased organizational effectiveness is to look at the situation from another perspective.

***Question Four: What challenges do CLO's face?***

In order for an organization to be successful in today's dynamic workplace, it needs to have a prepared workforce. This includes access to training resources, the ability to gain knowledge when it is needed, the opportunity to develop needed skills and the means to adapt to new technology (Levy, 2004). The cost of not having a proper learning strategy and vision in place can have severe consequences such as a stagnant workforce, obsolete technology and training, employee turnover, lack of availability of talent and poor leadership, all of which can all lead to financial losses.

There are a number of barriers and challenges that can inhibit the effectiveness of a CLO. Common challenges include a lack of alignment between business needs and learning. Senior executives may demand a certain type of program or initiative be implemented even though there is not a proven need for it. A CLO is faced with the task of trying to add value to an organization while also having to be selective with programs that are implemented and explaining to executives the justification as to why it would not be beneficial to implement certain programs versus others (Lustig, 2003).

Another obstacle a CLO must face is that learning programs may be perceived by senior management as the universal solution for any problem. Often when a particular problem arises such as a performance issue, training is looked at as the obvious solution. However, a CLO should insist that a performance analysis be done to justify if the performance issue is due to a need for training/learning or if it stems from another need and therefore can be solved by other means. Investigating the true case of the issue is the only way to determine the most effective way to resolve it. CLOs are there to help facilitate this change in the mindset of organizations.

Individual employees must be held accountable for results in order for learning programs to be successful. CLOs can implement very effective learning programs, but if the learner is not held accountable for applying the knowledge, skill or training to their job, then the value of the learning program is lost. The learners must buy into the learning initiative and work to utilize the knowledge they gain. Metrics need to be established to quantitatively or qualitatively measure the success of the program and improvement of worker performance.

Another common barrier to change and effectiveness is the expectation that certain trainings will automatically change individual behaviors. When the changing of workforce behaviors is necessary to generate business results, it will probably not be accomplished during a one-day training session. Executive management may expect behaviors to change because of the investment in the training. However, it also takes motivation, practice and follow-up to attain the intended results (Dowd, 2004). Along with attaining the desired result, CLO's have to be able to show the results of the learning in the form of monetary gain and/or savings.

Other common challenges that CLOs face are inadequate budgets and the inability to measure the value of learning. It is difficult to link learning activities to increased revenue or decreased turnover and costs thus proving the business need through metrics. Therefore, when a CLO asks for a larger budget or funding for additional initiatives, it may be difficult to convince senior management to allocate the necessary money. Often management wants to actually see the bottom line results and how the results correlate to investing in learning.

The most crucial barrier to a Chief Learning Officer's effectiveness is the inability to have an integral role in understanding and helping define the company strategy and vision. This stems from a CLO not having access to communicate with the executive staff regarding the direction of the company. Without direct input to the organization's future, it can be very difficult to align learning programs and initiatives with the goals of the business (Jossi, 1998). In order to have the desired access, a CLO must convince management that learning is actually an investment and not an unnecessary expenditure (Lustig, 2003). This is much easier today than in years past. However, it is still the biggest challenge today's CLO faces.

There are many constraints, barriers and challenges a CLO must face in order to develop a successful learning organization. However, when given the proper support, tools and resources the value add and effectiveness of a Chief Learning Officer is tremendous. Ironically, the "C" level status of a CLO is supposed to open doors to the board room and should give the CLO the additional clout they need to perform their strategic role successfully. This is dependent on how progressive the organization's senior management team is and how committed they are to organizational learning.

***Question Five: What is the career path of a CLO and how would a human resource professional be developed for a CLO role?***

Due to the fact that the Chief Learning Officer title is relatively new to the corporate world, there is no clearly defined career path that an individual can take in order to reach the position. Upon analyzing the career paths that current CLOs have taken, there are a number of similarities regarding education and background that could reasonably be identified as the building blocks for creating a competent Chief Learning Officer. In most organizations a CLO will need background and experience in areas such as corporate learning, learning management systems, human resources, training, customer service, consulting, and business ownership (Packer, 2000). Some research has shown that CLOs do not specifically have to come from a human resource background, as many of today's CLOs are hired based upon their work experience and knowledge of the business along with other credentials.

In addition to the appropriate background, CLOs should have expertise in areas such as business strategy, leadership, motivation, e-learning, and advanced system learning, team building, and most importantly industry specific knowledge. Industry specific knowledge and expertise makes it easier to understand business challenges as well as enable the design of solutions to those challenges. A CLO needs to know the business they are responsible for and be able to build specific programs based on that business.

Most CLOs attain advanced education including Masters and Doctorate level degrees. Coursework usually consist of programs relating to training management, project management, organizational development, human resource development, adult

education, business management and instructional design. These types of educational programs help CLOs build the competencies they need to become a successful leader as well as understand the academic theories that underlie the basis of their work. CLOs can generally be considered as advocates of life long learning and continuous development.

An example of a CLO's career path is Deb Capolarello, CLO of MetLife (Bonner & Wagner, 2002). She says her position was the result of MetLife's preparations to become a publicly held company and need for someone to drive the company's culture-change process. The MetLife executive group went looking for someone who could handle additional responsibilities to HR. They turned to Capolarello, who had been an HR professional throughout her career. When she took the CLO position, she acquired a group reporting to her on organizational development. That group worked with the business units to revamp the company's performance management process. In addition, Capolarello opened up her CLO position on other fronts, working with communications on consistent key messages and creating a new learning and development function to build the skills and tools to prepare MetLife for a test of public ownership. After that, all of employee relations and recruiting, as well as learning and development, were under her leadership (Bonner & Wagner, 2002).

Determining the required background, education and expertise that a CLO must possess in order to perform the position successfully for a specific organization will depend on a few different factors. One such factor is simply the size of the organization. In a smaller organization, a CLO may have to wear many different hats and actually may have to take on individual tasks such as creating a training program or conducting leadership seminars themselves. In an organization such as this, specific experiences and

expertise in just a few important areas may be sufficient. In a larger organization, with more resources available including staff members, the CLO may be able to focus on more high-level tasks such as strategic planning, developing learning programs and concentrating on global activities (Gordon, 2005). Another variable that background, education and experience will depend on is the organization's values. A progressive organization that cares about the development of their workforce may value long-term learning initiatives and employee development programs whereas other organizations may only be concerned with the present circumstances and therefore expect immediate solutions to the most pressing issues (Lustig, 2003). In a progressive organization, a CLO may have more flexibility to forecast future trends, develop strategies and base learning programs not only on current needs but also future needs. A CLO with less flexibility may have more limited opportunities to impact the organization with broader learning solutions and may be reserved to traditional human resources roles and responsibilities. Regardless of the type or size of the organization, a Chief Learning Officer adds value by changing the organization through learning and development.

In order for a human resource professional to be groomed for a CLO position, he/she must take several steps to build their resume. This may take a combination of events, networks, opportunities, and development of skills that may occur in any order. Generally, a career path will consist of receiving an advanced degree in a field related to business or human resources. Second, a future CLO must gain quality leadership experience as well as expertise in as many positions relating to learning or training as possible (Lynch & Sugrue, 2006). Just as important as leadership experience is management experience, specifically upper management experience. Becoming a

Training Manager or Director of Training and Development may be a possible stop on the career path of a Chief Learning Officer. The future CLO must be successful in each position in order to gain the trust of peers and superiors. He/she should have a record of completing large and challenging assignments as well as be able to make critical decisions regarding learning and development that result in high rewards. Often CLO's are sought after from outside an organization due to the belief that a fresh perspective and a non-biased approach to identifying needs and developing solutions is needed.

A Chief Learning Officer must advocate passionately for learning as a business imperative and build a learning culture in the organization, which improves people performance, which leads directly to better business results. Having passion for the work of a CLO is a must.

#### *Top Ten Reasons Why an Organization Should Employ a Chief Learning Officer*

*1. Develops a successful learning culture with strong values and focus*

Chief Learning Officers have the desire and ability to enhance or create a successful learning culture within an organization. They can effectively link the values and focus of the organization as presented by senior management to the learning culture and are essential for improved quality through the building of knowledge. A CLO can also create a vision that encompasses the desired culture, values and focus.

*2. Acts as a catalyst for change and creates value within an organization*

The CLO is responsible for forecasting future learning trends and needs; however, the ability to forecast is not enough. Initiating change within the organization and implementing programs that create added value for the organization are necessary

components of a Chief Learning Officer's role. Asking the right strategic questions, understanding that change needs to occur in order for an organization to be successful and then enabling that change through implementation, is the true test for a CLO.

3. *Aligns learning initiatives that support business goals*

In some instances, executives have business goals in mind but they actually fail to align learning initiatives with those goals. This occurs when a goal is determined but a roadmap to get to the goal does not exist. A CLO can ensure that learning initiatives are created to reach the goal with the overall strategic mission of the organization in mind.

4. *Acts as a champion for organizational learning and knowledge management by articulating a vision for learning and leadership and making it happen*

A CLO can gain buy-in and trust from upper management by developing a strong vision, creating a strategic plan and following through with results. Chief Learning Officers genuinely believe in the effectiveness and added value that their initiatives will bring to the organization.

5. *Develops stronger links between learning and the bottom line of an organization*

CLOs can bridge the learning gaps that exist within an organization and show how improving organizational learning can affect the overall financial success. Because CLOs align learning with the strategic objectives of the company, they can correlate learning initiatives to increased profits or reduced costs.

6. *Improves employee recruiting, retention and efficiency*

By creating a true learning organization, a CLO can improve recruiting, retention and efficiency because employees value the opportunity to continue to learn which can affect employee satisfaction. Increased employee satisfaction leads to better candidate pools, higher retention rates and improved efficiencies. This can lead to the creation of a dynamic workforce.

7. *Creates an environment where learning is readily available and is able to measure successes when learning occurs*

Just in time learning is an example of a program that a CLO can implement in an organization. CLOs know and understand new learning technology and can use it to a company's advantage. Along with understanding and having the ability to implement the learning technology, a CLO can ensure that measures are in place to substantiate the success of the program. Today's workers need tools to help them learn right now and a Chief Learning Officer can make sure the learning is available.

8. *Identifies critical areas for improvement and implements plans for resolution*

A CLO has the ability to analyze areas of improvement based on evaluations and true need. They are business savvy individuals who not only have the academic background but management experience as well. A CLO can assemble the resources needed to implement a plan for resolution.

9. *Creates productivity, revenue growth and net income growth through programs and initiatives*

The ultimate goal for a CLO is to increase productivity, improve revenue growth as well as net income growth by aligning objectives with learning initiatives and doing it successfully. A CLO responsibility is to add value to the organization, which means enabling a company to make more money.

10. *Designs, develops, and delivers learning solutions*

Depending on the size of the organization, the CLO may be solely responsible for the design, development and delivery of a learning solution, or he may oversee a staff of “learning experts” that will carry out the implementation of the programs.

*Summary*

Learning leaders called Chief Learning Officers have arrived in the corporate world. They are changing the way organizations think about learning and performance. As organizations move towards creating integrated learning functions, CLO positions are becoming increasingly necessary and more importantly crucial to the success of organizations. There is a greater demand for leaders who can provide strategic vision for workforce development and execute it. A link between human capital and shareholder value is apparent, and Chief Learning Officers are executive leaders who can provide it. Business executives have begun to pay attention to the gaps in their workforce’s knowledge and now understand that remedying those gaps through learning programs and initiatives can lead not only to higher profit margins but also to more satisfied employees (Nonaka & Takeuchi, 1995). By linking business needs to performance

strategies, Chief Learning Officers are enhancing individual and organizational productivity.

A CLO accomplishes these goals by applying the knowledge, expertise and education they have acquired throughout their career. Core competencies including leadership, vision, strategy, and change management aid the successful CLO in gaining access to the executive boardroom discussions and the trust of executive management. The CLO's ability to show executives the results of initiatives through return on investment calculations is instrumental in proving they are helping the organization's bottom line. Chief Learning Officers also develop a culture for organizational learning, continuous learning and knowledge management by identifying critical areas for improvement, conducting needs analyses and implementing solutions (Elkeles & Phillips, 2007).

Chief Learning Officers are not only performing the expected duties of the Senior Human Resource Manager or the Training and Development Director or equivalent positions held in the past; they are actually expanding those roles to include "C-level" responsibilities. The reason they have attained the "C-level" status is because the Chief Learning Officer adds that much new value to an organization.

## Chapter 3

### **Implications, Recommendations and Conclusions**

This chapter will include a brief discussion regarding implications of the answers to those research questions, recommendations for companies seeking to hire a CLO and a personal concluding statement.

There are four key conclusions resulting from the literature review:

1. Chief Learning Officers add value to an organization.
2. CLOs play an important role in driving strategy, change and quality through learning.
3. CLOs are unique from any other Human Resource Executive position
4. Organizations that have CLOs are generally more successful adapting to external challenges and integrating change internally.

During the course of the literature review, this researcher discovered that the title of the CLO is still not as common as the more popular CEO, CIO or CFO titles. The title has been around for approximately a decade and is still gaining momentum as current CLO pioneers pave the way for future CLOs. Companies such as IBM, GE, Cisco Systems and MetLife have employed CLOs and based on research the CLOs have added value to their organizations. Aligning learning strategies, integrating current learning technologies, improving quality and knowledge retention as well as developing employees all add value to an organization. CLOs improve customer satisfaction, bottom line profits, employee retention goals and company culture.

## **Implications**

There are a few different audiences that can benefit from reading this literature review including Human Resource Development professionals, Senior Executives, employees of organizations, Human Resources or business related academics as well as current/future Chief Learning Officers.

### *1.) Human Resource Development professionals*

HRD professionals benefit from this literature review because they are able to understand what a CLO is and identify possible career paths for reaching this role. They will be aware that there is a seat at the boardroom table for a Chief Learning Officer that is responsible for learning and strategy that they can aspire to become. This review also points out that now more than ever there is a continuing trend of organizations to recognize the importance of workplace learning and its role in the success or even survival of an organization.

### *2.) Senior Executives*

Senior Executives benefit from this literature review because they are able to understand the role a CLO plays in an organization and the added value they bring to a management team. They can easily identify skill sets that a successful should CLO possess and better appreciate the unique strategic learning perspective a CLO has. The review also allows them to assess their own organization by asking themselves whether or not their organization appreciates or understands the link between learning, change and strategy as well as look in the mirror to determine if they have someone that is currently fulfilling this responsibility.

### *3.) Employees of organizations*

Employees benefit from this literature review because they are able to understand better learning organizations and CLOs. They can then determine if their organization is:

- Appreciative of the link between learning and change
- Large enough to support a CLO position
- Open to change, different opinions and employees having a voice
- Willing to evolve by looking at the leadership team and asking if they are truly thinking strategically

An employee may be able to approach their manager or a human resources representative to question different learning practices or the current learning structure of the organization and suggest ways to improve including potentially looking at a Chief Learning Officer.

### *4.) Human Resources academics*

Researchers benefit from this literature review because they can refer to a resource that represents many different authors' thoughts and viewpoints regarding Chief Learning Officers as well as an assessment of the value they bring to an organization. CLOs may be the next step in the continued evolution of HRD roles and may open up the door for future roles. The research in this literature review creates many new questions regarding CLOs.

### 5.) *Chief Learning Officers*

Current and future CLOs benefit from this literature review because they can easily identify resources and references for further research. They will also be able to understand what an organization might expect of a CLO and what value they will be required to bring to an organization. Future CLOs can utilize this literature review to understand typical career paths and skill sets they will need in order to attain a CLO position.

### **Considerations for Employers**

When a company or group of Senior Executives is contemplating the potential need for a CLO, there are a few questions that they should consider asking.

#### *1.) Does your organization value learning?*

This is a key question that every organization should ask when determining if they can benefit from hiring a CLO. If the organization does not value learning and does not plan to in the future, a CLO would be of no use. However, if the company would like to move in that direction by transforming the culture to value learning, a CLO would be a great way to gain buy-in and add credibility.

#### *2.) Are you in a highly competitive industry?*

Employing a CLO is a great way to set yourself apart from the rest of the industry. We have already discussed all of the value a CLO can bring to an organization, but they are even more important when competition is strong. The CLO can work to link your business strategy with the learning strategy of the organization which may result in a competitive advantage including employee and client satisfaction and retention.

*3.) Does your company value continuous quality improvement and knowledge management?*

If the answer is yes, then a CLO would feel very comfortable in your organization. Continuous quality improvement and knowledge management are two ideals for which CLOs strive for. When these ideals are not valued, a CLO may be discouraged and not see eye to eye with the rest of the board room which could result in minimal change and thus minimal value.

*4.) Is your company currently utilizing learning technology?*

Learning technology is constantly changing and evolving. A CLO is responsible for ensuring the company is up to date with technology and utilizing it effectively. If your company is not using learning technology, but would like to, a CLO would have the expertise to build a learning system for the company and ensure it is maintained properly.

*5.) Has your organization had difficulty aligning strategic objectives with learning initiatives?*

Some organizations have tried to align strategic objectives with learning initiatives, but have not been successful. This may be due to a number of reasons including the incorrect people making decisions or decisions being influenced by individuals who are not concerned with learning initiatives. A CLO can earn the respect of all parties and lead the organization in terms of reaching strategic objectives through learning initiatives.

*6.) Does your company consider its approach to future challenges proactive or reactive?*

Reactive companies are usually a step or two behind the competition. These companies miss opportunities, they may lose clients or even employees. This may be

because they are not utilizing their resources to stay ahead of the ever changing business landscape. A learning organization attempts to proactively identify challenges and overcome them before they affect the bottom line. A CLO can help mitigate this risk by giving their input on strategy and the direction of the company in terms of knowledge management and learning.

Each of these considerations along with many others should be reviewed when determining if a CLO would be a good fit for an organization. Obviously, not all companies will benefit from hiring a CLO. Some companies are not truly invested in becoming a learning organization, while others may be too small to warrant a CLO hire. However, each company can take a look at how they do business and identify whether or not they value learning. If the company does value learning, then at least discussing hiring a CLO will be a good idea.

### **Reflections**

I chose the topic of CLOs and the value they add to organizations for a few different reasons. The title of the CLO intrigued me after first reading about it in a magazine article. I had never heard of a Chief Learning Officer and the “Chief” part of the title for an HRD professional caught my attention. I knew there were Vice Presidents of Human Resources, Training and Development Directors, and other similar titles, but I did not perceive those positions to carry the same value that “Chief Learning Officer” did. I had no idea what the responsibilities, skills, career path, or role a Chief Learning Officer played in an organization. I was determined to find out more information relating to this position including which current companies employed a CLO and why as well as what research and literature was available. Lastly I wanted to determine whether or not

this new title of CLO was just that, a new “title” for a Vice President or Director.

Through my research I found my answers and was able to determine that a CLO does add value to an organization and that they do have a unique set of skills and responsibilities that set them apart from other Human Resource Executives.

I care about this topic because I think it’s important for companies to continue to understand the valuable link between learning, strategy and organization success. If quality improvement, change management and linking learning strategies to company missions are important criteria to an organization, they should consider looking for a Chief Learning Officer. Companies sometimes believe that they are being strategic while making their business decisions, but in order for a company to truly become a learning organization, they need someone with the ability to link the business strategy to the learning strategy to be successful. At this point, I’m not convinced that CLOs are a widely recognized job title and I am hoping this literature review will help contribute to the understanding of what a CLO is and the benefits they bring to an organization.

Personally, I would like to aspire to be a CLO in the future. The development of leadership skills, strategic thinking ability and understanding different industries will be crucial. The role of a CLO is intriguing because a CLO not only affects the organization’s success but also plays a large part in the success of every individual in the organization. As employees continue to learn, develop and change to impact the direction of the company, they also impact their individual lives. Employees can become more engaged and value the opportunities their organization gives them to develop skills and tools for their own future. A company is only as successful as the people that make it up and their belief in what the company is doing. A CLO has an intricate role in that

philosophy and has the ability to influence the culture, values and evolution of an organization through their role as a leader and a visionary.

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