# Scorecard Model Helps IBM Evolve English Training

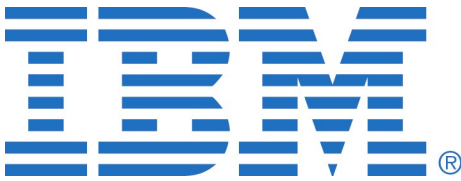IBM

Best Advance in Creating a Learning Strategy

November 2018

## Company Background

| Headquarters | Armonk, New York |
|---|---|
| Year Founded | 1911 |
| Revenue | USD 79.1 billion (Annual Report 2017) |
| Employees | 366,600 |
| Global Scale (Regions that you operate in or provide services to) | IBM has a global presence, operating in more than 175 countries. |
| Customers/Output, etc. (Key customers and services offered) | The company operates through five segments: Cognitive Solutions, Global Business Services (GBS), Technology Services and Cloud Platforms, Systems and Global Financing. |
| Industry | Information Technology and Services |
| Stock Symbol | NYSE: IBM |
| Website | www.ibm.com |

## Budget and Timeframe

| | |
|---|---|
| Number of (HR, Learning, Talent) employees involved with the implementation? | Ten people, including learning and the focal points of education from the global business solutions BUs. |
| Number of Operations or Subject Matter Expert employees involved with the implementation? | Two SMEs were involved in the implementation. |
| Timeframe to implement | Ongoing |
| Start date of the program | April 2014 |

## Business Conditions and Business Needs

As a leading global company supporting businesses around the world in IT services and consulting, IBM operates in 100 countries with over 366,600 employees speaking 184 languages across 96 nationalities. Like many global organizations, IBM requires universal communication skills for internal and external interactions. IBM is a globally integrated enterprise, organized to best service its customers and maintain its leadership position across many verticals and segments. The critical element to retaining a leadership position is to drive effective communication throughout every business process.

IBM Global Business Services (GBS) Brazil is a regional unit with global reach, guidelines and outcomes that is focused on consulting services for IBM's customers and partners. This regional unit has around 3,000 employees in multiple locations across the country.

IBM GBS Brazil understands that challenging and complex communication situations are frequent in employees' daily activities, (i.e., resolving client's issues in real time in synchronous communications in a virtual setting and managing asynchronous written communications).

**Challenges in GBS Brazil**

The first strategic implementation conducted by GBS Brazil was initiated in April 2014. Prior to April 2014, no criteria were set for enrollments in the English learning program — any employee could enroll without restrictions. The learning and knowledge department for GBS Brazil, represented by Ariadne Hamanovik (learning and knowledge consultant, GBS) and Marcia Neves da Silva (learning and knowledge leader, GBS), received critical feedback about the program from learners and managers. The

complaints were related to low effectiveness of the program and no measurement tied to outcomes. This was the starting point for the evaluation of their needs and building a new methodology to the language program.

The L&D team had three perspectives to keep in mind when developing a local approach to managing the program:

1. Opportunity to address diverse development needs (i.e., employees are unique, learning in different ways and needing focus on different aspects of language development).
2. Enable employees to apply their current skills to their learning path by using a tool that recognizes their current Business English level and lets them apply it through activities that are built around business situations (on–the-job support tools enabling informal learning in the 70/20/10 mode).
3. Flexible learning mode to correspond with the requirements of the VUCA (volatility, uncertainty, complexity and ambiguity) working world, where time management is one of the most important resources for a successful training program.

According to IBM's point of view, training programs should be linkable to strategic business objectives, focusing solely on what employees need to develop. The GlobalEnglish platform was identified as having the resources needed to help IBM employees focus on their current business communication gaps, plus aid them in improving their effectiveness communicating in English.

## Overview

According to Marcia Neves da Silva Jeronimo, Learning & Knowledge Leader, IBM GBS Brazil: "Before implementing GlobalEnglish as the sole provider for Business English learning, we had different providers for English learning. By setting GlobalEnglish as the only provider for the Business English learning solution, we managed to standardize the learning delivery method and set coherent KPIs across the organization, optimizing the budget issues as well."

### Employee Perspective

Employees in multinational organizations report to have on average only 23 minutes for learning (source: Bersin by Deloitte, 2017, Report on Disruptive Technologies). With the online Business English blended solution (GlobalEnglish One), employees can learn in small bites at any time they have free for learning.

From a user perspective, the delivery method and the content targeted their complex needs. Having a flexible solution that could tend to their business communication skills development from a "learn-on-the-go" approach, available anytime, anywhere was essential.

Here's a collection of comments from Brazilian learners toward the solution: "very flexible," "provides great content," "dynamic content," "it enables me to learn at any time via web," "it's a great training program, you have the flexibility to perform at various times and places," "you can improve various skills," "it is a clear method and purpose of learning," "excellent material" and "very good content and method."

### Company/Learning and Knowledge Division Perspective

Linking the program to strategic business objectives such as boosting innovation, enabling knowledge sharing, and supporting employees in their development were some of the key factors for success. This is visible in all communication related to the program shared with learners and with managers.

Learners' comments included: "I have monthly calls and need to explain my reports, after the course, I feel less afraid to speak in English"; "I am more confident when speaking English with others"; and "It [GlobalEnglish] helped a lot in the communication with our international VP and his technical team."

**KPI-Based Approach**

GlobalEnglish's customer success team provides ongoing consultation on recommended KPIs for solutions. KPIs are monitored in the scorecard model, with full visibility across the organization. IBM GBS Brazil demonstrated that within 14 months it was possible to improve the program performance by 200%, allowing GBS to have a strategic outlook on endeavor.

**Cost-Effective Solution Inducing High Engagement of Employees**

IBM Brazil has a highly engaged pool of learners with 83% of program participants regularly using the solution. Looking at July 2017 until Feb. 28, 2018, the average time on site/user/month is 3 hours and 8 minutes, resulting in calculated average costs/hour falls below $1 per hour.

## Design and Deployment of the Program

**Vision and Mission**

The motivation for IBM to make GlobalEnglish available to their employees globally in 2008 was to lower handicaps on career development. The program in IBM GBS Brazil contributes to the ability of the Brazilian team to share its expertise, assisting organizational learning with IBMers worldwide. However, the L&D team saw the need to change the global approach and adjust it to address local cultural needs and business objectives.

**Strategy Elements**

**Implementation Type** — Strategic implementation including strong manager involvement and strong ownership of the program by the local L&D leaders represented by Hamanovik and da Silva Jeronimo, alongside executive decision maker Marcelo Guiulfo.

**Dedicated L&D Team Supporting the Program at All Stages** — Launch and onboarding, ongoing program management and evaluation.

**The "Scorecard Model"** consists of a monthly report run by the learning and knowledge team that evaluates the monthly performance of each user enrolled in the GlobalEnglish program. The main KPI set was time spent on site/month — at least two monthly hours were expected from each user. If the objective wasn't met, each manager's "team" would be flagged as "red." The "red flag" meant that no new enrollments could come from that

team until all active users were within the KPI range proposed by the learning and knowledge team.

All results are uploaded monthly to the "wiki" page of the Brazilian GBS division and visible to every employee. That visibility reinforces the sense of "ownership" from each participant and his/her manager.

**Nomination Process** — In contrast to the global approach allowing all employees to enroll for the program, IBM GBS Brazil links the opportunity to join the program to the quarterly needs development discussions between line managers and employees. Approval from the line manager is needed to enroll — and by the processes above, every manager would look closely at each enrollment — to make sure their team would not be impacted by a learner not meeting the KPIs.

**Methodology** — Scorecard is the heart of the processes, providing feedback over the previous month's achievements on the 15th of each month to all employees and managers. The scorecard includes manager and employee-related views and follows a street-sign color code helping to recognize the status for both stakeholders and enable feedback from managers regarding the learners' status and experiences.

**Visibility** — To promote transparency, the scorecard is published on an internal wiki page at the beginning of each month.

**Internal Communication** — GBS Brazil organizes a series of webinars to line managers, learners and HRBPs to inform them about the program each quarter and to help engage current learners. A "Top 5 Learners" initiative is also held quarterly: users with the most time on the platform during a quarter have their names and performances published on the intranet and internal blog. Highlighting top performers drives motivation toward the GBS division.

**Measurement Tools** — GlobalEnglish Dashboard and IBM´s scorecard, as described above.

**Applied solution** — IBM GBS Brazil has been applying GlobalEnglish One, an online blended learning solution. The solution provides access to:

- Online self-paced personalized learning programs with 11 levels of online curriculum from beginners to advanced learning needs.

- An interactive, engaging environment for learners to practice Business English and receive feedback from a professional English teacher in a virtual classroom.

o   Learners can join one session per week.

o   Sessions can be chosen based on date/time that is convenient for the learner.

o   Learners discuss current business issues, ask questions and receive feedback from the teacher.

o   Classes are designed to improve existing English skills at all levels and are available 24x7.

**Figure 1: Sample Screenshots from Within the Learning Tool**



Source: IBM

On-demand access to everyday on-the-job support tools and templates offer faster, smarter working in a global environment. For example, email templates help with responding to incoming emails in the correct language.

**Figure 2: Email Templates**
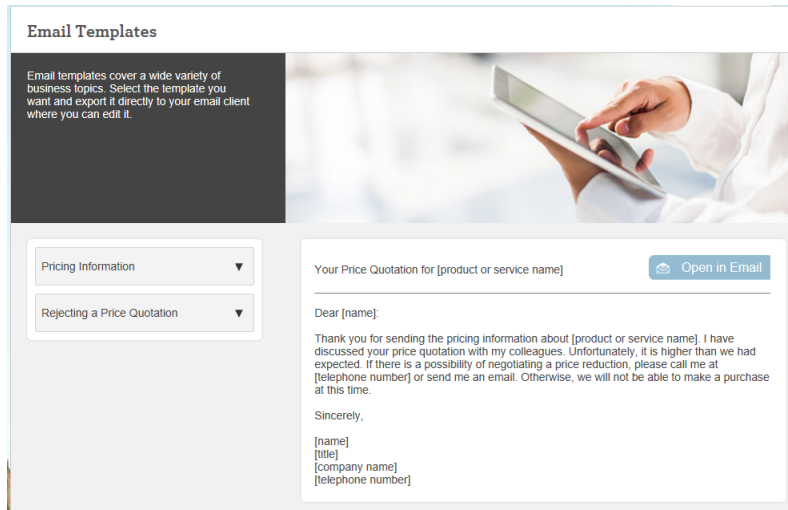


Source: IBM

There are also business situation indexes included with a library of exercises to prepare for real job situations such as negotiations, holding presentations, leading and attending meetings or having small talk about culturally acceptable topics.

**Figure 3: Business Situation Index Library**



Source: IBM

All those features allow employees to exercise skill development in a safe environment before executing in real job situations.

**Governance**

Program enrollments are hosted on YourLearning — manager approval is needed for the enrollments. After the line manager confirms the enrollment in YL, it is processed accordingly.

Regular progress communications are sent to each learner by the program administrator.

Quarterly meetings are held with GlobalEnglish customer success managers, reviewing their progress and listening to recommendations on how to improve program performance.

## Change Management Efforts

"We faced a lot of resistance when implementing the Scorecard model. Managers would not accept that they couldn't enroll their users. There were difficult barriers to overcome internally." — **Marcia Neves da Silva Jeronimo**, IBM learning and knowledge leader, GBS

It was not easy for IBM GBS Brazil's team to implement this cultural change and transform what was a "benefit" into a strategic learning process. When the team decided to put restrictions on the enrollment process and set performance KPIs, many people did not see the "bigger picture" nor did they buy-in.

Several managers questioned the scorecard model, inquiring what benefits it would bring when it prevented people from enrolling into the program. Slowly, attitudes began to change and better understanding arose from the challenging situation.

By the end of 2014 when the governance model began to take shape, 75% of learners did not meet minimum usage expectations. Only 5.65% met GBS's expectations (eight hours per month) and 19.35% GlobalEnglish minimum usage guidance (two hours per month).

**Figure 4: Learners Usage Expectations**
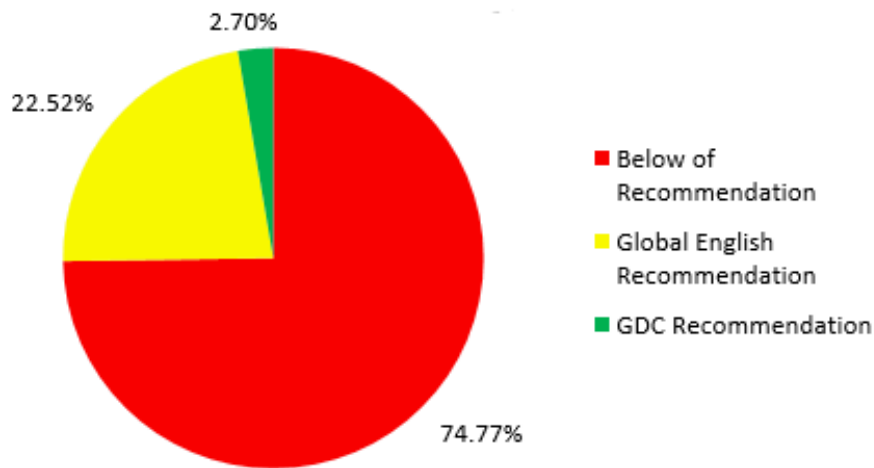
Instead of concluding that the purchased solution was not suitable, the GBS learning and knowledge team conducted an orchestrated investigation. Using GlobalEnglish's expertise and advice alongside their own cultural knowledge and project management experience, the scorecard model was applied. Within two years, there was excellent turnaround.

The program turned into a highly effective initiative with 75% of learners meeting minimum usage recommendations (32.22% met GBS recommendations and 42.78% followed GlobalEnglish´s recommendations).

**Figure 5: December 2016 Information**
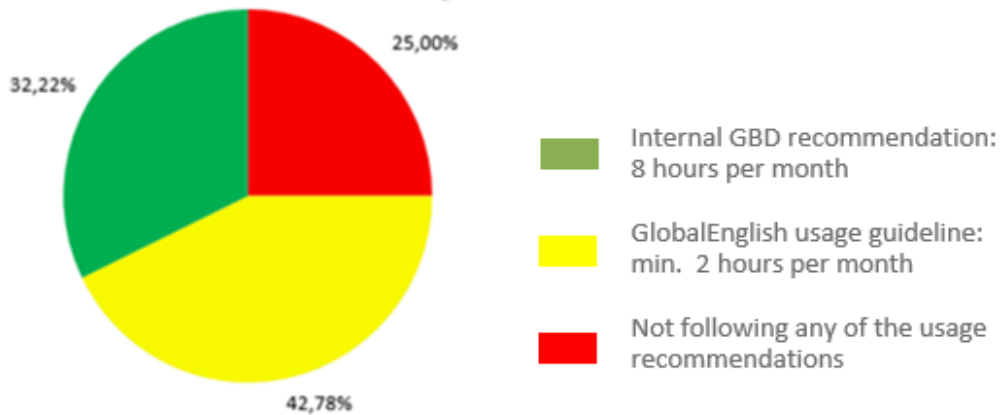


Source: IBM

Looking at results from a year-over-year perspective, the percentage of users with more than 2 hours of average time spent on the learning platform steadily increased (green bars):

**Figure 6: Learning Platform Time Spend Year-to-Year Comparison**
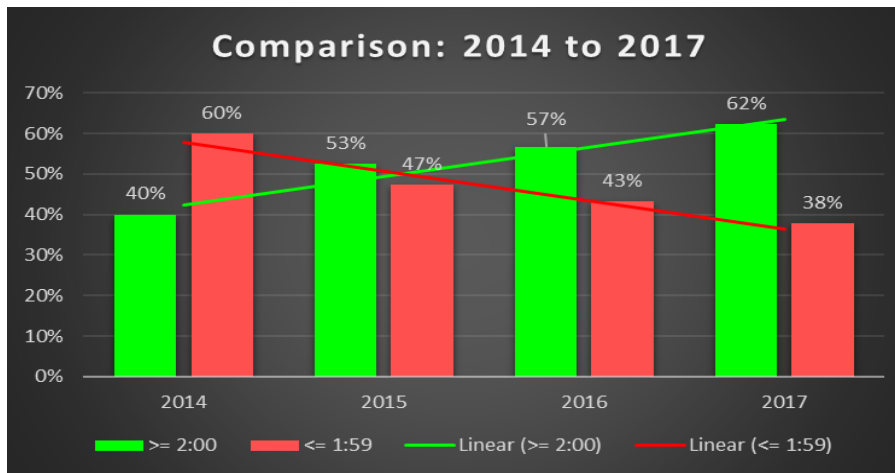


Source: IBM

## Measurable Benefits

Results in a learning project come not only from numbers but from qualitative feedback of users, managers and program "owners." Feedback is extremely important to IBM and GlobalEnglish. Both companies always are interested in learning where they can improve

and how the solutions have been supporting people's growth and performance around the organization.

Humberto Alecsander Nascimento, test specialist for IBM GBS (now acting as a business analyst), is one of the top performers from the last 2017-18 cycle. He explained how being engaged in GlobalEnglish's program through the Scorecard method has been a game-changer in his career over the last year:

"I was recently invited to act as a business analyst on my project, directed more toward the operational part of the business. By accepting this task, I have interactions every day with a team member from Costa Rica, having to discuss complex technical matters and even covering for her during her vacation period. She only speaks English, so it's vital to communicate effectively. In IBM, from a breakfast with the leadership team, to phone calls, to hotel check-ins, you have different situations where English is imperative — and I'm more confident to apply my English skills after using the platform."

The scorecard model impacts managers and their teams in many ways, such as increasing employees' productivity, enhancing employee communication skills and fostering talent management since managers take an active role.

Andre Marino Kuller, application development innovation leader for GBS Brazil, describes the difference the scorecard model had when keeping track of his employees' performance as a manager:

"When it was implemented, I thought it was very interesting. We receive reports that are user-friendly and easy to look at. It's easy to identify each employees' performance, how much they have been dedicating themselves to the program and the activities they have been completing, badges earned, etc. I always take the time to congratulate them over their performance, as a motivational driver."

Due to the dynamics of the business, productivity increase is always something that all teams strive for. Andre reported that his employees' performance did not only increase their productivity, but also his, indirectly.

"I think their biggest gain is being independent. Before their English improvement, I had to jump on calls and do activities on their behalf that they couldn't do because of their language limitations. When there was contact with a team outside of Brazil in an international project I had to step in. Today, it's very rewarding to see them keeping their performance on the learning platform and also be able to be more independent,

participating in calls and meetings by themselves. That increased their productivity and freed up my time, increasing mine as well."

Over the last survey held with GBS Brazilian users, this is what they reported:

- **96%** of learners were able to use what they learned in the working place.

- **92%** confirmed that they improved communication skills at work with clients and teams.

- Learners reported productivity gains of **three hours per week** as a result of skills improvement and access to the on-the-job support tools.

In IBM Brazil today, there are around 83% of active users (with at least one hour/month of learning) dedicating on average 3 hours and 22 minutes monthly to studying their Business English (measured between March 2017 and early 2018).

Using this approach, GBS Brazil demonstrated a 45% higher engagement rate in terms of time on site than other global projects within IBM. IBM Brazil is 28% more cost-effective when looking at cost/hour results compared to IBM globally.

## Overall

The implementation of the scorecard model evolved and brought new visibility to the training program. Key findings could be ranked in four main categories:

- **Governance** — It may sound like a simple approach but an entire cultural change was necessary to overcome the many challenges imposed along the way: managers' resistance to not being able to enroll their employees due to poor performance, visibility of the entire results for everyone in the company (giving exposure to great and poor performers) and so on. The evolution shown by users' performance is directly related to how the program managers were able to create processes that enabled result-measurement through the creation of a set of rules, prizes and consequences, which are vital to a structured corporate training program.

- **Effectiveness** — Having multiple programs and providers for one initiative was a "lesson learned" for IBM GBS Brazil. By focusing all their efforts on a single program, they were able to optimize results and manage aspects such as budget and logistics in a better way. Choosing an online delivery solution led them to be able to set standard KPIs across the organization and position themselves as

trusted advisors to the tool and method, helping their colleagues to maximize their performance within the program.

- **KPI-aligned strategy** — By choosing a program that was able to deliver outcomes that are in line with IBM's business objectives, GBS Brazil gave their employees a chance to focus on what's important to them and their company. That not only drives motivation but leads to better results in productivity maximization, saving employees' time and to job performance improvements.

- **Partnership-driven implementation** — Combining GlobalEnglish's project management expertise with GBS Brazil's governance approach was essential. Acting as a single unit, the cooperation between both organizations delivered the best possible outcomes for the learners and managers. By providing webinars, transparency with results and constantly gathering feedback and improving the learning tool, both companies were able to create an environment of constant evolution and improvement as seen by feedback from learners, managers and IBM program managers above.

For the future, IBM and GlobalEnglish are continually looking to deliver the best experience to participants in each program.

In the words of Marcelo Guiulfo, eLearning offering manager at IBM Learning:

"Our industry is very dynamic, so the way we operate must also be quick and Agile. Removing the language barrier allows us to execute with more precision and creates a more positive working environment. Improved Business English skills are critical for working as a unified team, bringing us all together and positively impacting our business results."

With the launch of a new mobile solution (GlobalEnglish Reach) in 2018, GlobalEnglish is working with IBM to integrate the new solution to every IBM learner in the world and GBS Brazil is promoting the new tool internally. A new approach, skills-driven and based on a micro-learning approach, will be integrated with the KPIs already existing in the program. Having a solid strategy makes introducing new resources and objectives seamless and capitalizes on making the most out of their offering. Innovation is at the heart of both companies and the future is bright when driven by result-oriented efforts.

**Figure 7: IBM GBS Brazil, Email Communication Templates**





Source: IBM

### Figure 8: IBM GBS Brazil, Email Communication Templates



Source: IBM

### Figure 9: IBM GBS Brazil, Wiki Page

| 🏠 | Idiomas | | **Global English** |
|---|---|---|---|

**Para conhecer sobre o programa acesse: https://globalenglish.com/**

**Relatório de acompanhamento: Utilização Fevereiro/2018**

📊

Relatório Utilização Pearson English.xls

O Gerente só poderá solicitar a inclusão de um novo funcionário do seu time caso o percentual de funcionários já inscritos e participando ativamente do programa seja >=70%. Veja abaixo como medir a participação dos seus funcionários, considerando que para ter uma participação ativa o funcionário precisa ter mais de 2hrs de atividades registradas no mês.

| Hrs recomendadas por GBS | Acima de 08:00hrs |
|---|---|
| Hrs recomendadas pelo programa | 2hrs a 7:59min |
| Hrs abaixo do recomendado | 0hr a 1:59min |

- **Não iremos renovar as inscrições dos funcionários que não tenham feito regularmente o mínimo de horas indicado pelo programa (2hrs a 7:59hrs/mês).**

**IMPORTANTE:**

- Após incluir o pedido para análise em nossa ferramenta, o retorno se foi aprovado ou rejeitado será enviado próximo da primeira semana do quartil escolhido
- Se o pedido for aprovado, as instruções de inscrição serão enviadas no email de aprovação, fique atento.
- Qualquer problema ou dúvida entre em contato com **ariadneh@br.ibm.com**

Source: IBM

## About Brandon Hall Group

Brandon Hall Group is an HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management. With more than 10,000 clients globally and more than 25 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

### Inspiring a Better Workplace Experience

Our mission: Empower excellence in organizations around the world through our research and tools every day. At the core of our offerings is a Membership Program that combines research, benchmarking and unlimited access to data and analysts. The Membership Program offers insights and best practices to enable executives and practitioners to make the right decisions about people, processes, and systems, coalesced with analyst advisory services which aim to put the research into action in a way that is practical and efficient.

### Membership Offers Tailored Support

Our membership delivers much more than research. Membership provides you direct access to our seasoned team of thought leaders dedicated to your success, backed by a rich member community, and proactive support from our client services team.

### RESEARCH ACCESS & EVENTS
• Reports
• Case Studies, Frameworks & Tools
• DataNow® & TotalTech®
• Webinars and Research Spotlights
• Annual HCM Conference

### ADVISORY SUPPORT
• Ask the Expert
• 1 on 1 Consultations
• Research Briefings
• Benchmarking

## CLIENT SUCCESS PLAN

• Your Priorities
• Executive Sponsor
• Client Associate
• Monthly Meetings

## Strategic Consulting Offers Expert Solution Development

Our consulting draws on constantly updated research and hundreds of case studies from around the globe. We provide services that simplify and target efforts to produce business results.

## BENCHMARKING

• Competitive/Comparative
• Maturity Model
• Custom Research

## STRATEGY

• Business Case
• Planning
• Organization & Governance

## TECHNOLOGY SELECTION

• Vendor Selection
• Architecture Design
• Systems Evaluation

## DEVELOPMENT & INTEGRATION

• Program Design
• Assessment
• Survey
• Process Integration

For more information, contact us at success@brandonhall.com.