

From Courses to Campaigns: Citi's Journey to a Culture of Continuous Learning



Authors

Brian Murphy, *Head of Learning and Leadership Development in Europe, Middle East & Africa, Citibank*

Charles Jennings *Co-founder, 70:20:10 Institute*

Contents

1. Executive Summary	2
2. Introduction	3
3. Drivers for Change	4
3.1 <i>Drivers within Financial Services</i>	5
4. The Roadmap	6
4.1 <i>Aligning the Citi Learning Organisation</i>	7
4.2 <i>Equipping Learning Advisors</i>	8
4.3 <i>Engaging Citi's People</i>	9
4.4 <i>A Campaign Approach to Learning</i>	9
4.5 <i>Building and Executing an Engaging & Aspirational Brand</i>	10
4.6 <i>Social at the Centre</i>	10
4.7 <i>A Different Approach</i>	11
4.8 <i>Challenging People to Learn Differently</i>	11
4.9 <i>Resourcing and Skill Sets</i>	12
4.10 <i>Participation, Engagement and Impact</i>	12
5. Top Tips for using a Campaign Approach	13
6. Top Tips for Sustaining a Culture of Continuous Learning	14
7. Other Tips to Support Continuous Learning	15
8. Summary	16
9. Bio: Charles Jennings	17
10. Bio: Brian Murphy	18

1. Executive Summary

In 2014 Citi embarked on a journey to transform the way it encourages and supports its workforce development.

Reflecting on the changing nature of the workplace, and on specific changes happening in the global financial sector, Citi decided to build for the future in new ways.

The journey so far has produced positive results both internally and externally. The firm has been able to embed new approaches helping to move 'courses' to 'campaigns'. This move enabled a reduction in spend on traditional classroom training by 38% over the first two years. Across the HR and learning industry Citi has become an acknowledged leader in innovation in approaches to learning and performance.

A move to the campaign approach, underpinned by the 70:20:10 framework, has allowed Citi's workforce to access the resources they need when they need them, and to better do their jobs and enhance their personal development.

By leveraging social learning techniques, on-the-job learning, and personal challenges, the L&D department at Citi has helped increase participation in development activities, raise engagement and employee satisfaction levels, and embed continuous development into everyday activities.

2. Introduction

This paper documents the journey Citi Learning has taken over the past three years to build a robust approach and set of learning and development (L&D) practices capable of supporting Citi's large workforce into the future.

The journey has been one of change and realignment; of setting a new direction; of building a new culture based on continuous learning; and of supporting the creation of a high performing organisation fit for the demands of tomorrow's world.

Brian Murphy, Head of Learning and Development for Europe, Middle East and Africa at Citi defined the challenge he and his colleagues faced as they set out on this journey as follows:

"Three years ago, the team at Citi Learning did some soul searching. We found ourselves facing a pivot point in our journey, at a crossroads of choices faced with fundamental questions about why we existed.

Increasingly the traditional training and push 'L&D knows best' approach simply wasn't delivering results. Faced with a rapidly evolving business landscape and changing nature of work, people were increasingly bypassing the L&D department, this at the same time as the organisation was struggling to adapt and build innovation and agility in its culture.

We held difficult debates as members of the Learning team struggled to let go of what they knew, what they were good at, traditional course content, and instructional design. But very soon we arrived at the consensus that we should find a new path and a new role.

Rather than just change how we do our work, the team decided to change what work we do entirely and indeed reposition why we exist."

The developments that Murphy and his team envisaged were not minor re-adjustments. They would involve a radical change in the way the L&D team worked and interacted with its internal customers across the Bank.

Underpinning the change was a principle that Citi's people, in whichever part of the firm they worked, deserved better than a menu of training courses. The expertise held by every individual across the Bank would be utilised. L&D professionals would build new capabilities themselves, emerging from directing and managing pre-ordained training for employees to becoming change agents for learning opportunities that were owned by employees and managers themselves. In this way, their roles and work would be tightly linked to the success and challenges of the Bank as a whole, bringing learning and performance improvement together as never before.

For this change to be successful, the Citi Learning team knew a clear strategy was needed. For this, the decision was taken to adopt the 70:20:10 model.

3. The Drivers for Change



Traditional training approaches have struggled in the face of the changing and challenging environment within most global organisations such as Citi. Today's world is one of ever-increasing complexity and the need for greater speed. Organisations require more agility and teamwork, more decision-making and an evolving set of skills to address their challenges.

Citi's Drivers for Change

These factors are all accentuated within the financial community. Traditional training simply cannot meet the demands.

The challenge of speed is a major stumbling block. Developing training solutions takes time. The detailed process of determining details of the problem that training may help to address, designing and developing the training interventions, and then implementing them, is usually a time-consuming one. Training solutions cannot be 'switched on' in immediate response to business problems. This inherent inertia of training solutions is a major barrier for fast-moving organisations such as Citi.

3.1 Drivers within Financial Services

Citi and the Financial Services industry generally is being faced with rapid and transformative change. The traditional banking model with its intermediary role is being re-evaluated as never before. In addition, the world of work is transforming with new behaviours, new technologies, and a millennial workforce requiring Citi to build a much more collaborative and agile culture.

Citi Learning identified four major needs to be addressed within its new learning strategy.

1. The need to embed ethical decision-making
2. The need to drive innovation and to future-proof Citi to meet the changing nature of work
3. The need to attract and engage top talent.

In response to these drivers Citi Learning developed a forward-looking strategy and a laser-like focus on building a culture of workplace learning.

In practical terms the Citi Learning team identified three key areas on which to focus:

1. Facilitate connected learning
2. Embed experiential learning
3. Reframe the mindset to support the concept and culture of continuous learning.

All three areas rested on the foundation of empowering employees to take charge of their own development, and of learning at the speed of performance.

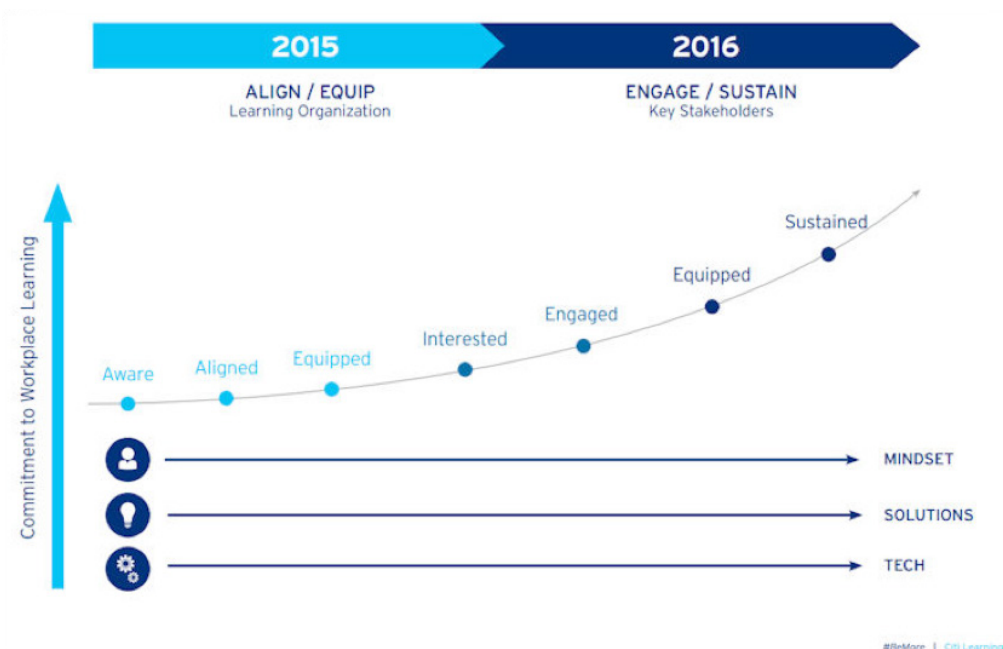
4. The Roadmap

The journey that Citi Learning embarked on, one of fostering a culture of continuous learning, was neither quick nor simple. It required creative thinking and careful planning.

A clear roadmap was devised at the outset. This roadmap consisted of three distinct but interdependent streams:

1. **Mindset changes** that were needed to embed the new approach
2. Specific **solution sets** that would be developed and deployed
3. **Technology** required to support the new approach.

Citi's Roadmap



It was planned these work streams would be addressed through each of the journey's two main stages:

- a. initially to align and equip the Learning organisation to create, build and support new workplace learning services;
- b. then to focus on engaging key stakeholders and sustaining the change.

4.1 Aligning the Citi Learning Organisation

Citi's Approach to Connected Learning: The 3E's



The three 'horizontal' of Mindset, Solutions and Technology were key as the Citi Learning function sought to reimagine learning and its role.

The mindset change was a crucial building block, requiring the Learning team to immerse itself in 70:20:10 as learners first and as learning professionals second. Rich social learning experiences (originally stimulated through a 6-week workshop led by social learning expert Jane Hart) established social and collaborative mindsets through experiential learning. This was followed by the development of Citi Learning's Beliefs & Guiding Principles which set out a 'manifesto' for the function; in effect a true north to help members of the function navigate their way to the 'new normal'.

Citi embedded the 70:20:10 approach within these principles but chose the 3Es terminology which fitted better with its organisational lexicon. Murphy explains:

"70:20:10 is not a formula, it's a rule of thumb. The important thing is for us was to extend focus to the 70 and the 20. We used the term 'Experience, Exposure and Education' and the 3Es as this resonated with our people better than the numbers".

This initial work was followed by a period of dialogue and exploration and ultimately alignment within the Citi learning community. Murphy elaborates:

"this was a critical period to enable the change. The Learning community really had to do some soul-searching as to what workplace learning was, why it was important at Citi, and what our new role was in the work. This provided necessary room for people to air their concerns and really understand the topic and implications further before talking to the business. It would have been a mistake to have taken a short-cut at that stage".

4.2 Equipping Learning Advisors

It was essential to equip learning professionals with the right tools to enable them to operationalise the new methodology.

A workplace learning playbook and collaborative community of practice were constructed to provide resources for learning professionals. Additionally, a learning maturity map was developed to allow learning advisors and business leaders to evaluate the level of workplace learning maturity within the various business lines. Murphy explains:

Citi's Playbook for Learning Advisors

"We realised we had varying levels of organisational readiness for workplace learning across Citi's varied business lines, and this maturity map really helped our Learning Advisors 'meet the business where they are' in terms of learning culture".



4.3 Engaging Citi's People

Adoption of the 70:20:10 approach was a fundamental repositioning of the learning proposition at Citi. The learning team needed to develop a people engagement strategy that would first get people interested in the subject before driving engagement and education around workplace learning. They knew they had the right model (the 3Es) but how could they bring this to life for people?

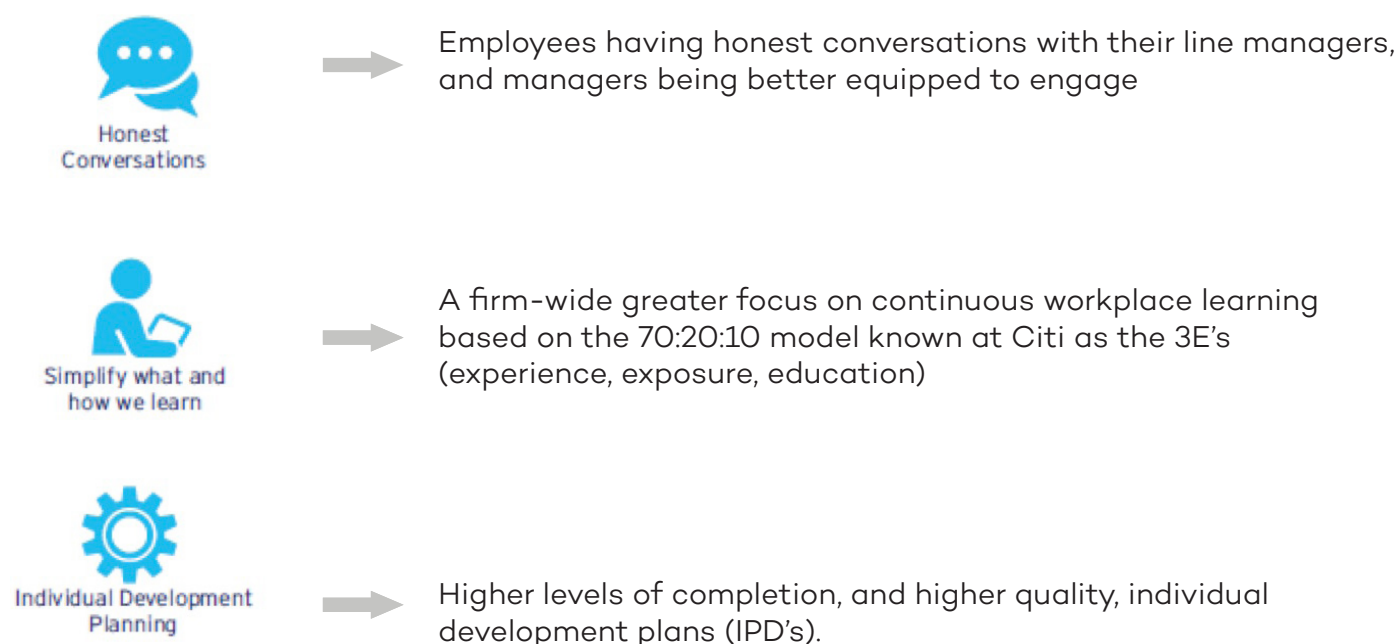
The answer to this question was to implement a campaign approach.

4.4 A Campaign Approach to Learning

Citi launched #BeMore, a CEO sponsored, non-HR branded, multi-channel internal marketing campaign designed to empower people to take control of their own development and to embed the 3Es into the organisation.

#BeMore was designed to support the development of behaviours needed to create a culture of workplace learning within a highly complex, multinational and multicultural organisation such as Citi.

The resulting behaviours and outputs to be realised included:



Additionally, the #BeMore campaign strived to simplify access to a global suite of tools and resources.

The over-arching principle of the #BeMore campaign was that its objectives aligned closely to Citi's global business objectives.

4.5 Building and Executing an Engaging and Aspirational Brand

Citi's largest hubs in EMEA were selected as the initial priority audiences. However, it was important that this campaign impact all 54 countries that comprise the wider EMEA region as a whole.

To truly connect with the Citi workforce, #BeMore was created to tap into individual aspirations rather than just focusing on career plans. As such, the initiative sought to pull, rather than push, people to engage.

Individual and personal story-telling was at the heart of #BeMore. This helped it cut through the internal communications 'noise'. Additionally, the #BeMore campaign was designed to be original, authentic, humorous and targeted for change. It was non-HR branded and was positioned in places that had never been branded before to highlight and encourage employee ownership and engagement.

4.6 Social at the Centre

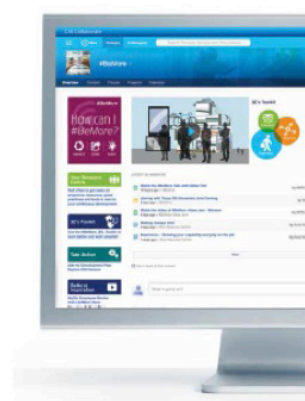
To ensure wide reach and two-way engagement, a social approach was adopted as the main #BeMore channel. This was supported by a clear content strategy and community manager to facilitate discussion and encourage the development and sharing of user generated content.

The Citi Learning team wanted this campaign to be employee owned. Instead of building from ground-up, #BeMore leveraged Citi's internal social platform Citi Collaborate (based on Jive technology). Citi Collaborate was already supported by a mobile application with 100,000 users accessing globally every month.

This allowed #BeMore to benefit from engaging with an existing user base and ensured the campaign was embedded in a technology that was organisationally future-proof.

#BeMore Overview

-  30 Day Development Challenge
-  Employee Stories
-  Resource Centre
-  Ideas Jam
-  BeMore Talks
-  Development Planning



4.7 A Different Approach

The #BeMore campaign adopted a different engagement approach to those used previously at Citi. It set out with the clear intention to:

- Embrace the power of leaders via inclusion and participation
- Benefit from the power of the influencers (the shadow hierarchy) who were most active within Citi Collaborate.

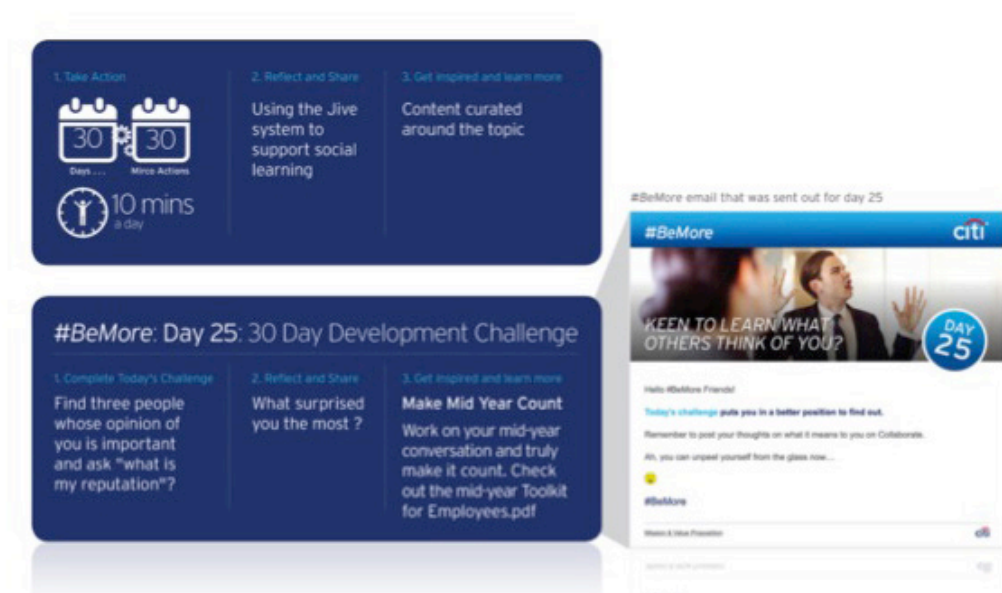
This second intention was achieved by engaging influencers in the campaign and gaining their support in communicating out key messages and activity, as well as taking on the roles of incubators and ambassadors.

Other #BeMore levers were used. These included videos to engage and educate; external and internal speakers to inspire; templates to enable storytelling; and curated content and resources within the Citi Collaborate platform. Various techniques were used to encourage and support user-generated content contributions.

4.8 Challenging People to Learn Differently

Central to the #BeMore campaign's engagement plan was the 30-Day Development Challenge.

Example of One Day of BeMore's 30 Day Development Challenge



The 30-Day Development Challenge involved challenging the target population to undertake 30 micro actions (one per day). Each micro-challenge was designed to take less than 10 minutes to accomplish and involved a challenge to do everyday activities differently. The micro-actions might be something that could be undertaken at home or in the workplace.

To ensure maximum engagement, the daily challenges were reinforced through gamification, produced in multiple languages, supported by marketing collateral and often involved user-generated content.

4.9 Resourcing and Skill Sets

Delivery of the #BeMore campaign involved bringing marketing skills to the L&D function. A marketing and engagement consultant was brought in to head up the #BeMore Project Team. This ensured co-ordination of existing L&D, Corporate Communications, HR and Business Heads from across Citi's 54 countries in EMEA.

New Role of the Learning Advisor



#BeMore had the effect of changing the Learning team's priorities as well as their core skillset. Instead of designing and managing traditional training programmes, they were required to support employee-owned learning experiences. Curation, community management, marketing, story-telling and performance consulting were the new skills needed for Citi's learning professionals.

4.10 Participation, Engagement and Impact

Understanding that behaviour change takes time. Citi used several metrics to track progress of the campaign.

Short-term impact was unquestionable, with key statistics including:

- An increase in the number of people completing their development plans
- A positive impact of the campaign on employee satisfaction scores
- #BeMore activity converted into everyday activities within the business.

Making #BeMore a non-HR or Learning branded campaign was critical to its success. Exploiting breakthrough creativity by partnering with Citi's client marketing colleagues, and then activating the creativity with the help of the Internal Communications functions were key factors.

In addition, video storytelling proved powerful not only in terms of engaging and creating interest, but through providing a powerful way of educating employees and managers about the new 3Es approach and how the model could be harnessed for their success.

Targeting Seniors to Encourage Participation



Posters, Digital Screens & Flyers



Merchandise



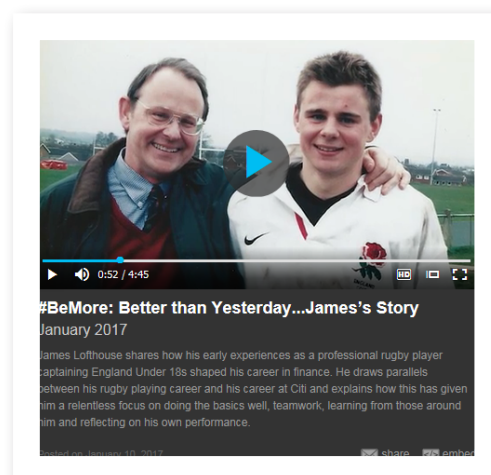
5. Top Tips for using a Campaign Approach

1. **Clarity of purpose:** Be clear on what you seek to achieve and the behaviours you wish to align with the top of house
2. **Focused collaboration:** Create a diverse project team with different skills and clear roles and responsibilities
3. **Know your people's passions:** Create a non-HR brand that engages the hearts and minds of your people
4. **Once upon a time:** Use storytelling to inspire your people
5. **Mix and match:** Execute your brand across a variety of channels to ensure you reach a diverse group
6. **Pull don't push:** Encourage seniors to participate and seek out and engage your shadow hierarchy
7. **Go creative:** use standout creative approaches. Use humour and non-corporate 'speak' treat people as adults
8. **Challenge:** your people to do something differently, don't just tell them how to do it
9. **Connect:** Appoint a dedicated Community Manager to curate content and develop the conversation
10. **Go social:** Encourage and drive user generated content

6. Top Tips for Sustaining a Culture of Continuous Learning

1. **Alignment:** Make sure that the company's development and performance planning systems are reconfigured to represent the 3E/70:20:10 methodology and terminology
2. **Storytelling:** Use employee and leader stories to sustain the change. Help people see how this is making a difference. Share success stories
3. **Upskill:** Continue to build modern learning skills within the learning function. Strong performance consulting, community management, story-telling, curation and marketing skills become game-changing capabilities
4. **Business Case:** Link the workplace learning agenda to the business case for change. Keep it relevant by being connected to the major change initiative on the CEO/Board's agenda
5. **Celebrate success:** Tell your story externally, and consider an awards nomination – one of the best ways to ensure reflection, course correction and continuous learning

Storytelling using Video



Storytelling using User Generated Content



Ongoing Dialogue with Key Seniors



Slawomir Sikora
CCO Poland



James Bardrick
CCO UK



Deepak Jain
Head of C&T EMEA



Atiq Rehman
Head of C&T ME & Africa



Marc Luet
CCO Russia

Tools for Managers



Manager Toolkit

citi



7. Other Tips to Support Continuous Learning

Equipping people managers to support their teams' development is an important element of embedding change and moving to the sustain phase. Manager cards, manager toolkits and other performance aids helped Citi embed workplace learning into daily practices.

A feature of year two of the Citi journey was the engagement with the firm's people to co-architect the learning tools and solutions they were looking for. Ideas Jam events took place across the EMEA region in 2016. These were high-energy, dynamic events and very different from the standard focus group approach, instead using a world café format and asking Citi's people to consider the following three questions:

1. **How is the world of work changing for you?**
2. **What do we need to learn, unlearn to be successful?**
3. **What do we need to do at Citi to support this change?**

Much of the feedback from Citi's people supported the concept of the 3Es and equally helped add further urgency to the last 'horizontal' to support the implementation of a culture of workplace learning: Technology. Citi's people were embracing learning through experience and exposure but wanted better technology to help them do this. In parallel Citi had been considering the implementation of Degreed, a learning content aggregator and social learning connector. The output from the Ideas Jam sealed this deal and in January 2017 Citi signed an agreement to implement the Degreed platform for all its 250,000 employees

8. Summary

As with any change initiative, Citi has learned lots of lessons along the way.

However, early very positive results indicate the journey is the correct one and that the move from an almost exclusive focus on courses, whether classroom or eLearning, to embrace the concept of development supported by campaigns is the right one.

As with any journey such as this, it has required L&D to sometimes move out of its comfort zone. There has been a need to reach out for support from other parts of the organisation, to work closely with managers and support them as they play their part on the process, and to re-think many earlier assumptions about 'delivering training'.

Internal results indicate the change have played an important role in improving levels of engagement and in providing more effective support and resources that help employees get better at achieving their business goals.

Externally, Citi's learning team has been recognised as a clear leader in change and innovation. In November 2016, the team's #BeMore campaign won the Learning Technologies Gold award for the best use of collaborative and social learning technologies. In February 2017, the team again won Gold. This time in the Learning and Performance Institute's annual Learning Awards. This time for innovation in learning.



BIO **Charles Jennings**
 Director, Duntroon Consultants
 & Co-founder 70:20:10 Insititute

Charles has more than 35 years' experience in the fields of strategic performance improvement and capability building.

He spent many years investigating innovative approaches to learning and performance as a researcher and university professor and has also held senior roles in the business world, principally as a chief learning officer and as a member of leadership and HR management teams in global companies.

For seven years until the end of 2008 he was the Chief Learning Officer for Reuters and Thomson Reuters where he had responsibility for developing company-wide strategy and leading a 350-strong team of learning professionals for the firm's 55,000 workforce. He led Reuters learning organisation through a transformation from a group of semi-autonomous traditional training departments to an integrated business-aligned learning and workforce development function using the 70:20:10 model. The result was increased impact, value and effectiveness, as well as significant reduction in cost.

Since 2008 he has worked as a consultant to organisations across the world, helping them extend their focus on learning into the daily workflow.

His career also includes roles as Head of the UK National Centre for Network-based Learning, as a Business School Professor, in senior business roles for global companies including Strategic Technology Director for Dow Jones Inc., as an evaluator for the European Commission's learning, performance and eCommerce research initiatives. He also sits on steering groups and advisory boards for national and international learning, performance and business bodies.

Charles is also a member of the Internet Time Alliance, a think-tank of leading learning and business performance practitioners helping organisations exploit emerging practice to 'work smarter'.

He is a Fellow of the Royal Society for Arts (FRSA), a Fellow of the Learning & Performance Institute (FLPI), and a Fellow of the British Institute for Learning & Development (FBILD).



BIO **Brian Murphy**
Head of Learning and
Leadership EMEA, Citi

Brian is the Head of Learning & Leadership for Citi, in Europe, the Middle East and Africa. He leads a team of learning and performance consultants who facilitate learning experiences which help drive individual, leadership and organisational performance.

Brian also leads global efforts to develop a culture of continuous workplace learning across Citi's 200,000 employees in over 100 countries.

In 1999 Brian started his career with Citi in Ireland before moving to the UK. He has held a series of regional HR Director roles where he

has led the HR function for various banking divisions within Citigroup.

Brian believes passionately that the L&D profession is at a historical crossroads. It can choose a traditional approach which is increasingly irrelevant to the 'real work', or it can become a key enabler for business performance, innovation and culture change.

Brian is a Chartered Fellow of the CIPD and a Fellow of the Learning & Performance Institute.