Strategy and the Chief Learning Officer

Millbrook Distribution Services

Verna J. Willis and Gary L. May

In the views of the originator of the chief learning officer (CLO) concept—Willis—and the first practitioner—May—the role a CLO must fulfill is different from a knowledge manager's role. A CLO is much more deeply engaged in the social learning and social communication processes that make a learning organization. Many honest efforts have been made to untangle the roots of the CLO concept, the intended purpose, the qualifications, and above all, the future of the position. Here the pioneers write to set the record straight, discussing how the role of the CLO was conceived, where and why it was implemented, and what it has meant for Millbrook Distribution Services. They demonstrate that the CLO role is not just a Fortune 500 *phenomenon, but has application to smaller companies as well.*

Background

The chief learning officer is fast becoming a strategic, lead player in the drama of today's business organizations. The historical nature of the Millbrook case study makes it important to set the stage a bit differently. Theory is often born and gains its credibility through interplay with practitioner experience, and this is the situation with the Millbrook case. Thus theory about the practice of a CLO as well as the real-world practice itself play balanced parts in how the case has developed and how the position of the CLO at Millbrook continues to evolve.

Willis first articulated the need for a CLO in a 1991 article published in the fledgling *Human Resource Development Quarterly*. This

article grew out of the experiences Willis had managing corporate learning initiatives in a large commercial bank in the Northeast during the 1980s. Those were turbulent times, with deregulation, hostile takeovers, and a steady round of acquisitions occupying everyone in human resources (HR). The urgent preoccupation of HR with issues not related to human resource development (HRD) was the trigger for Willis to make the case that HRD should be separate from HR and reported elsewhere from it in the tables of organization.

In the common structural arrangements of organizations, there has simply been no one at the top to make sure learning across an entire system is leveraged, not sacrificed. That should be the core responsibility of a CLO, Willis reasoned, selecting a title that would clearly align with the literature on learning organizations.

In terms of the learning organization, the CLO by definition needs to be accountable to the whole system and must have broad discretionary power. The CLO operates by using knowledge about how adults learn, how learning affects work, how value systems operate, and how social and technical systems in an enterprise or in their environment may either support or counteract each other. Though such issues are known to have enormous impact on the bottom line, they have been historically neglected, studied as isolated phenomena, or parceled out to specialists. What if, instead, they could be the strategic responsibility of a learning executive who is institutionally charged with finding and implementing integrated solutions?

Earlier additions to the corporate alphabet, including the terms *chief information officers* (CIOs) and *chief knowledge officers* (CKOs), seemed to bolster the technical fluency side of organizations without addressing the social learning side. Technical fluency is easily accepted as a competitive necessity. But finding a site for a CLO trial run—a place to test theory about yet another chief, whose role would not be nearly so definitive—seemed implausible. Then came a series of events that brought about the opportunity to do just that.

May learned a family merchandise distribution business from the ground up. He was vice president and general manager in 1985 when the family firm was sold to McKesson Corporation. May's decision to return to college for a degree in HRD exemplified his conviction that human factors are both underestimated and absolutely key to an organization's success or failure. That same conviction has since carried him not only to the CLO position at Millbrook, but also to completion of a Ph.D.

Most HRD students at Georgia State University work full-time. May was no exception. He tackled management development responsibilities for a company in crisis that would be dissolved if it could not be made profitable. He did not walk into a CLO position. First, he considered the viability of the CLO idea and worked it through to his own satisfaction before he began to explore the idea at work. His start-up actions as a CLO, cited in an earlier writing (Willis and May, 1997), are incorporated here. Initiatives he has undertaken since then are described to round out the case. The time that has elapsed since he became a CLO in January 1994 allows him the advantage of hindsight in describing for others what has happened.

The scope of May's responsibility may be different from the range of responsibility and activity a CLO would have in a larger corporation, and, if so, the contrast should be instructive for practitioners as well as useful for classroom discussion. Indeed, one key point to be drawn from this case is that the CLO role is not just a *Fortune* 500 phenomenon, but may have particular application to smaller companies as well.

The Millbrook Context: Forces of Change

Millbrook Distribution Services is one of the largest specialized distributors of health and beauty care, general merchandise, and specialty foods in the United States. Its specialized distribution adds value for slower-selling hard-to-manage products by providing special services for retail stores, such as picking and shipping products in individual units instead of case packs and providing merchandising and stocking support at the retail level. With annual revenues exceeding $500 million, the company supplies 35,000 items to more than 10,000 retail stores, primarily supermarkets and discount department stores. Millbrook operates from four distribution centers across 40 states and employs 2,100 people, including a national salesforce.

Millbrook was formed in January 1994, by the merger of two seasoned distribution service companies acquired in the 1980s by the pharmaceutical distribution giant McKesson Corporation. Through a series of acquisitions, McKesson had attempted to create a national distribution network for supermarkets to parallel its traditional system, which served independent drug stores. But the supermarket industry proved to be a difficult proposition. Conventional supermarket operators were losing sales to superretailers like Wal-Mart that introduced logistical innovations to increased efficiencies and lower prices. The

supermarket industry fought back with efforts to drive costs out of the supply chain, placing intense pressure on suppliers to lower costs by reengineering distribution and in-store services. Traditional service distributors that had made their mark in a low-technology era through labor-intensive services were in trouble.

Robert Sigel, an industry veteran with a proven track record of innovation for McKesson, was appointed president and CEO of the newly formed company and given a mandate to enact sweeping changes to align Millbrook with the new business environment. Sigel recruited a new senior management team to help redefine and restructure the business. May joined this group as CLO, reporting directly to the president.

Sigel's announcement explained the rationale:

> The appointment of Gary May as chief learning officer, reporting directly to me, should send a very clear signal that continuous learning is of strategic importance. We are in the process of changing into a very different company in order to respond to new realities in the marketplace. I'm counting on Gary to draw on his business background, academic training, and communication skills to help us manage through the non-stop change and transition.

May brought double-barreled credentials to the new position. He carried a degree in business administration and 17 years' experience as a second-generation business owner before selling the family distribution business to McKesson in 1985. He knew the ins and outs of the particular industry. His graduate studies added reflective insights and new tools for human resource development to already tested management and leadership skills.

Executive trust has entered significantly into May's evolution as CLO for the new company. Earlier Sigel and May had sold similar businesses, worked together in industry trade associations, and collaborated on various projects after McKesson acquired their companies. Both were aware that the cultural integration of the acquired companies and the McKesson Corporation had not gone well, in part because the mix of distribution services was not entirely compatible. The rest of the new management team pulled together by Sigel could also count on May as one of their own—someone who had held line responsibility, met payrolls, dealt with bread-and-butter customers, and implemented operating changes. They could anticipate major contributions from him as they worked together.

Millbrook knew it had been successful in its business turn-around by 1997, when the investment firm R.A.B. Holdings, based in New York, purchased Millbrook from McKesson. Moving from a division of a giant, multinational corporation to a leveraged buy-out situation was, according to May, "quite a shock." Again the culture change was radical, but the prospects for the future were—and still are—exciting. May adds, "We're a privately held company, very entrepreneurial in spirit, with a whole new agenda and a new set of opportunities."

The Job of a CLO

In May's view, the concept of CLO is a work in progress at Millbrook and bears little relationship to traditional concepts of training and development. Figure 1 (Willis and May, 1999) illustrates the positioning of the CLO as part of the management team. The CLO's primary mission is threefold:

- to facilitate learning and change
- to improve individual, team, and organizational effectiveness through the integrated use of communication, performance consulting, organizational design, and knowledge sharing practices
- to support business strategy and tactics through research and experimentation.

That position is designed first to serve as a strategic resource, representing the HRD perspective in the strategic planning process

Figure 1. The management team at Millbrook.
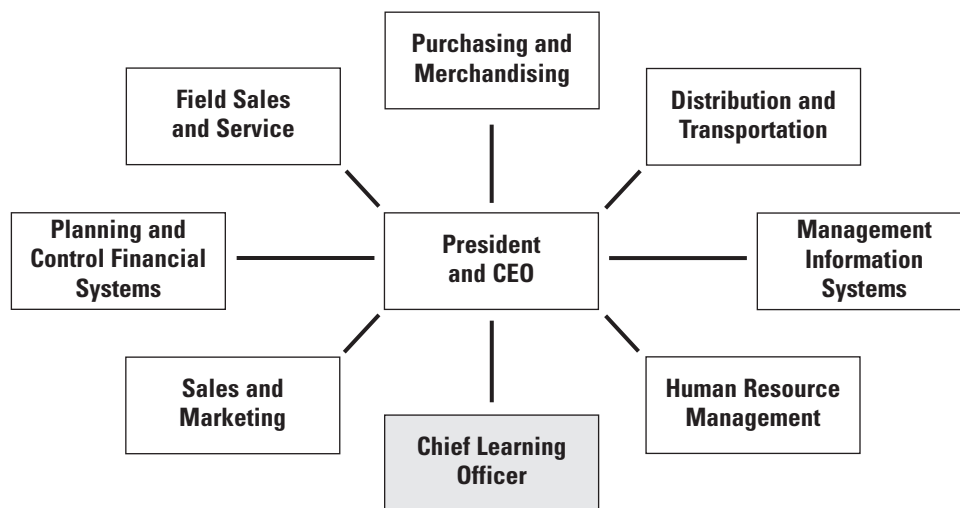
at the senior level and ensuring that HRD efforts are linked to the organization's strategic goals. Second, the position represents an expert resource, providing best practices knowledge on learning, and serving as an entry point for external consulting expertise. Finally, the position serves as the process owner of four processes deemed critical to organizational learning:

- managing internal and external communications
- overseeing needs analysis, design, testing, delivery, and evaluation of performance improvement interventions
- chartering and equipping business process redesign teams
- fostering communities of practice to ensure sharing and transfer of learning in the workplace.

Management of the formal communication processes of the organization as part of the CLO's responsibilities is believed to be a leading-edge innovation. On the basis of the writings of Gayeski (1993), the assignment recognizes the importance of managing communication processes in an information age. In times of nonstop change, it is essential to bridge the traditional islands of corporate communication—training, employee communications, public affairs, corporate media, documentation, library systems, policies and procedures, and advertising and marketing—to create integrated, consistent, and coherent messages to stakeholders. As the saying goes, the creation of a permanent revolution requires control of three systems: communication, education, and banking. Millbrook's CLO has responsibility for two of the three.

In terms of organization, the CLO staff has been kept deliberately small, building on Watkins and Marsick's (1993) concept that learning processes must be embedded in the line organization and that individuals and teams must take ownership for their development and learning on a self-directed basis. Accordingly, May has just two direct reports: a communications manager and a learning coordinator who manages the learning centers and provides administrative support. The communications manager, in turn, is responsible for two communication professionals who provide graphic design and writing services. Outsourcing provides speed, flexibility, and access to additional expertise as required. The major functions, such as field sales and service and distribution, have training managers reporting directly to the senior vice president of the function. May spends about 20 percent of his time directly involved in the training function, usually providing support to the training managers, who serve as consultants. Line managers, who have been through a train-the-

trainer workshop, deliver the formal workshop training in the Millbrook organization.

Views on Knowledge Management

May is careful to make a distinction between knowledge management and what he views to be his role in supporting learning and helping to build capability in the Millbrook organization. Wanting to be quoted directly, he says:

> To me, the term *managing knowledge* suggests transactions—capturing, storing, and retrieving explicit knowledge. This is certainly important and I've worked with our chief information officer on a number of projects related to our corporate intranet and other tools to codify critical knowledge and learnings at Millbrook. That's the "know what" of knowledge. But my critical concern is the "know how"—the tacit knowledge that cannot be reduced to simple constructs or rule-based behavior. Try, for example, to describe how to ride a bicycle or develop a trusting relationship with a difficult customer. I subscribe to Senge's (1999) view that learning is a process that occurs over time, always integrates thinking and acting, always involves lots of errors and mistakes, and always involves interaction with others on a team in a work context. This is knowledge that is difficult to reduce, capture, or manage because it is constantly evolving. As an aside, that's one reason traditional training classes have so little transfer. The learner is usually apart from his or her team and out of context.
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> So the critical question is: How is knowledge diffused and shared in the organization? The answer is not in published procedures but in informal networks—people talking to people as a way of learning—what are now being called communities of practice. So one of my roles is to foster these networks. I recently attended a conference that included a knowledge café focused on this issue of supporting communities of practice. My learning team created a metaphor we called *knowledge gardening*. Our thought was: You can't make a tomato plant grow. All you can do is see that the plant gets appropriate sunlight, water, and fertilizer and is protected from weeds and bugs. That image works for me. I see one of my roles as helping create the environment that fosters knowledge sharing informally. For example, our account managers, as a community of practice, have been learning to use some new consultative selling techniques to grow our business within existing accounts. We've created a forum

for them called Experchange that provides for sharing and discussion of their successes (and failures) both in small groups and through intranet bulletin boards that allow productive inquiry (for example, "I just ran into a problem. Has anyone had a customer respond like this?"). The central point, again, is that learning is a process that involves discovery, action, and observation and reflection with others in an ongoing, integrated way. It's tough to codify in a dynamic work environment. The type of learning we want at Millbrook is in the nervous system. It's like riding a bike. We want fluid and adaptive expertise. Individuals and teams at higher levels of competence are not operating from rule-based behavior.

Customer Focus

May also takes his cues from the fact that, as he says, "We begin and end with our customers. What are their needs?" He believes the work of the CLO is applicable at each point in the continuous cycles that become spirals of need and need satisfaction. It is the customer who validates and confirms the mission of the business organization, which in turn drives the business strategy. Strategy involves inventing and choosing options, determines the culture needed to accomplish the strategy, and leads to modifications of the systems in use to create competitive advantage. If there is, in fact, advantage to the customer, that customer is satisfied and the mission of the company is again ratified.

The mission is revisited if there is a lack of customer support for it. May notes that all of the executive team is involved in this ongoing mission-strategy-culture-systems process, but feels the CLO's unique contribution is the ability to think and work cross functionally and help the CEO synthesize and integrate different viewpoints. Figure 2 (Willis and May, 1999) shows May's depiction of the CLO's systemic, central role in the work of the organization.

The First CLO Initiative: Cultural Transformation

The first two years in the new position of CLO at Millbrook were devoted almost exclusively to assisting with the development and communication of a new vision and strategy for the organization and tending to the cultural transformation required to support the new corporate direction. The change was complicated by the geographic diversity of the distribution centers and the distinct cultural differences of the two merged firms, one based in New England and one in the Midwest.

Figure 2. A systemic view of the CLO's role.
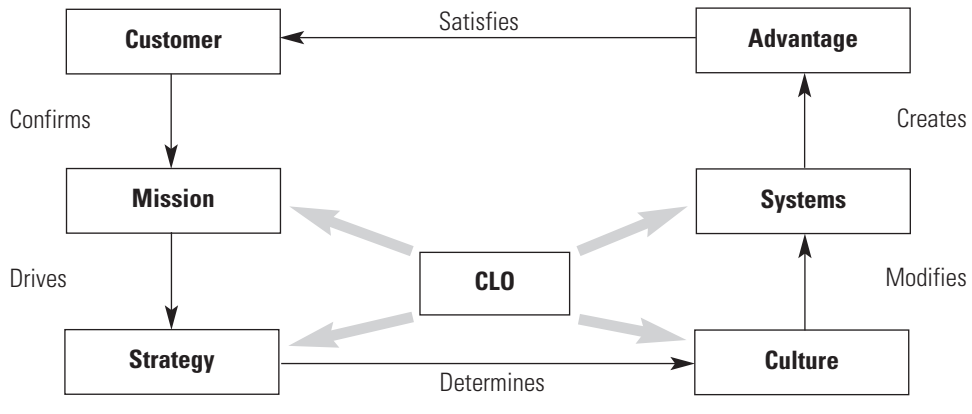
The literature provides ample evidence of the difficulty of cultural change (for example, Trice and Beyer, 1993; Tichy and Sherman, 1994). As Marsick and Watkins (1994) noted: "Training programs can help deliver skills needed for organizations to change, but do not address the deep-seated, mental models and attitudes or the organizational structures and norms which perpetuate them." Three examples of interventions illustrate the role of the CLO at Millbrook in the cultural transformation process.

The first intervention laid an essential groundwork. Working in tandem with the CEO and the executive committee, the CLO led the design of graphic images and metaphors to help communicate the new marketplace vision for Millbrook and the new mental models and behaviors required for success. With the involvement of line employees, four images were constructed—the Millbrook team mission, core values, 10 commitments, and the cycle of success—and incorporated on a continuing basis into the corporate decor, communications, training programs, and team meetings. However, these formal statements of organizational philosophy have little power to change behavior without the concurrent reinforcement of what Schein (1991) calls "mechanisms for embedding and transmitting culture." In popular terms, it's called walking the talk. Here, the CLO's contribution was to work collectively and individually with the members of the executive committee and department managers on understanding and operationalizing Schein's mechanisms.

The CLO's second key intervention was the development of a warp-speed restructure protocol designed to examine functional norms,

take layers out of the organizational structure, reduce costs, improve communications, and set the stage for process reengineering and continuous improvement initiatives. This change drew heavily on Weisbord's (1987) sociotechnical strategies, such as the future search conference, and made use of a variety of organization development (OD) process tools. The purpose was to effect rapid changes in a department's structure while involving all the players openly and candidly.

The third intervention was one in which the CLO helped support culture transformation through the development with McKesson OD staff of a proprietary workshop series called Trekking the In-Betweens. It is based on a change model developed by William Bridges (1991). Senior line managers delivered the workshops to help equip employees with ways to deal constructively with the confusion, uncertainty, and ambiguity of nonstop change.

Other Learning Initiatives: Culture Maintenance

The cultural transformation effort is considered a never-ending process, but as the interventions took root, attention could be paid to other kinds of learning initiatives. These were designed to support the marketplace strategy and address deficiencies in skills essential to maintaining the new culture. This strategy included the construction of a comprehensive learning plan designed to replace the traditional classroom paradigm with more individual assessment and self-directed and active learning initiatives supported by the performance management system. This ongoing, systemic learning process was then supplemented by specific learning projects linked to strategic issues.

For example, during a strategic planning retreat for senior executives, which May attended as both a senior executive and facilitator, it was agreed that the organization as a whole lacked critical thinking and problem-solving skills. The executives agreed that addressing this deficiency, which was perpetuating inefficiencies and contributing to higher costs, should be the key learning intervention for that fiscal year and integrated with all the other cost-improvement projects that the Executive Committee targeted.

Another strategic issue was—and continues to be—revenue growth in the face of an intense, competitive marketplace. The CLO worked with an external marketing firm, the Executive Committee, senior sales management, and his communications staff in the formulation of a new marketing strategy and advertising campaign based on the tag line distributing solutions. This, in turn, led to the development of a new consultative selling model and skills training for the salesforce to support the new strategy.

Contemporary Initiatives of the CLO at Millbrook

In notes addressed to academic colleagues in 1999, May described his work succinctly: "I usually have two or three major projects and four or five short-term projects in the works at any one time. Much of my time this current year has been devoted to working on initiatives related to business development."

Expanding sales to current accounts is considered the most profitable way to grow. Three individual projects, all aimed at supporting the initiative of existing account growth, illustrate the broad spectrum of May's interventions related to Millbrook's strategic needs. These included:

- a new marketing plan
- account manager development
- promotional process redesign.

In working with the new marketing plan, May led a research and development effort over a two-year period to determine what new selling proposition is needed to convince the large supermarket chains to outsource product lines to Millbrook. May then managed research projects with several pilot accounts to empirically validate this new approach. Satisfied with learning from the pilots, the CLO was helping to transfer the knowledge to the sales and marketing team, and accompanied members of the sales team on sales calls, role modeling live presentations to retailers, and coordinating study projects and proposals for both current and prospective accounts.

In the second initiative, account manager development, May led a project team whose charter is to reskill and upgrade the account manager position. This effort includes an overhaul of the processes for selection, training, goal setting, coaching, and performance review.

May's role in the third initiative, promotional process redesign, is to charter a business process redesign team in partnership with the CIO and facilitate the effort to map the current process, identify disconnects, and redesign the process to be more effective and efficient. This is an example of a core cross-functional business process in which much can be lost "between the white spaces on the organization chart" (Rummler and Brache, 1995). May calls the last initiative a gorilla of a change project and a long-term proposition.

The key common factors in these three initiatives from the CLO's perspective are his depth of experience in this industry, his comfort working across all functions of the organization, and his thinking with a whole systems viewpoint. These three separate but integrated business growth projects illustrate the broad nature of May's CLO responsibilities and his intimate involvement with the strategy and tactics of

the business. May sees himself primarily as a catalyst, advocate, and equipper in these projects. He notes: "I must stress that everything we've accomplished is a team effort and requires the involvement and support of other Millbrook executives and employees at all levels of the organization. While there's still much work to be done . . . we've budgeted for significant growth in every single account for [1999]."

How the CLO Is Evaluated

Together, May and CEO Sigel developed a performance measurement process for senior management at Millbrook that is built around a structured dialogue on performance. Specific behaviors are identified through a variety of self-assessment and multirater 360 feedback instruments, some developed internally for the Millbrook culture. These contribute part of the data for the discussions that take place. Four areas of performance improvement are addressed:
- key performance indicators
- process improvement projects
- behaviors
- professional development.
  The dialogues are scheduled quarterly.
  Concerning his own review, May says:

Due to the nature of my work, I have a limited number of quantitative performance indicators, all budget related. So most of our discussion focuses on my management of projects. I prepare a plan document for each project that includes a synopsis of the problem or opportunity, the proposed solution, the action steps and timetable, deliverables, and projected costs. I'm evaluated against this plan in terms of coming in on target, on time, and on budget. I know that the HRD field promotes the idea of level three and level four evaluations (behavior change and impact on the business), but these projects tend to be complex, and we do not have the resources or time to control for all variables at this level.

The CLO at Millbrook lives by his own precepts: He plans a personal development experience for himself each quarter. It can be a book, a CD-ROM course, an outside seminar, or a professional conference like that of the Academy of Human Resource Development. He reports on each of these to the CEO and offers a briefing to the Executive Committee on how ideas gained might be useful in the company.

Lessons Learned

After nearly six years in the position, one lesson May believes every CLO will learn is that: "The biggest shock in the boardroom is...that there are no clear answers to the strategic issues, only trade-offs. Business today is an uncharted sea of constant change. Solutions to problems often become obsolete before implementation. We even have a tag line for the phenomenon—OBE'd, or Overcome By Events. *Flexibility* and *tenacity* are the key words."

May does not believe that creating CLO positions and expecting strategic contributions from them is just a fad. The authors have found in personal conversation with CLOs like Steve Kerr (1998) at General Electric and Judy Rosenblum (1996) at Coca-Cola that their organizations are also committed to the concept. What this means for succession planning is yet to be determined. May suggests that the commonality of the individuals who are CLOs is "their senior position in the organization and their intimate involvement in shaping and supporting the strategic direction of the organization." For those CLOs who are successfully fulfilling this mission, their success alone may be sufficient to ensure the preservation of the CLO position beyond their own tenure.

In the Millbrook case, the CLO is tilling new ground with an executive charter that is crossing boundaries and that tends to amplify the work of the whole executive team. Willis and May believe the CLO is an unprecedented kind of catalyst in organizations, serving to combine technical and social work factors through communication, and paving the way for employees to contribute their very best to the collective enterprise.

Questions for Discussion

1. Can a CLO who reports one or two layers down from the chief decision makers ever really perform strategically?
2. If as some people believe, the roles of CLO and CKO are converging and will one day be the same, how would you reconcile the different sets of assumptions about professional preparation for these jobs?
3. To what extent are previous line experiences and executive trust critical to CLO success? Should the CLO be expected to have already acquired the mindset of a top executive?
4. Should the CLO position become an integral part of the management team in every organization? Assuming that there is presently an incumbent in the position, should that CLO groom his or her own successor? If so, how?

5. Does it make sense to require that a CLO should have all external and internal corporate communications in his or her job portfolio? Why or why not?

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