Case Study: Scaling Learning in an International Bank

The “Bank” has over 200k employees across 3 continents including North America, Europe and Asia. The organization has considerable technology at hand including modern laptops, mobile devices and infrastructure that supports co-located and distributed teams. The employee base is highly educated and experienced. Internet access is high-speed and ubiquitous.

The organization has pockets of new technologies such as mobile, cloud, big data and AI, however, there is still significant legacy technology and technical debt[1]. And, while there are small pockets of innovation and collaboration present, many groups still have a legacy mindset and prefer to operate in the comfort and safety of their silos[2]. The legacy technology, technical debt and siloed-based, waterfall approaches result in a very slow pace of execution, resistance to change, lack of innovation, long project timelines, and IT projects that often fail to please stakeholders and users.

Leadership and the marketplace are demanding better performance and results. They want more innovation, quicker time to market, more efficiencies and happier customers. Competitors in the marketplace are pursuing similar goals and many are further ahead on the journey to improve.

Budget is available - but comes with high expectations. Deploying “like for like” solutions is not acceptable. Leadership has heard many great things about Agile[3], Lean[4], Design Thinking[5] and DevOps[6] - as forms of digital, business-oriented learning. The Bank wants to become flatter, more nimble, more flexible and more innovative. All of which needs to be part of a new environment of continuous learning and improvement.

The Bank sees itself as unique, complex and operating in a challenging environment. Leadership recognizes that such a change is a journey and they are expecting this to be a long term investment. However, results need to come quickly and the learning solution cannot get in the way of day-to-day work.

Proposed Solution

Organizations succeed not based on remembering answers to known problems, but instead by finding the best answers, in limited time, to new questions and problems. The Bank didn’t find itself lagging the industry due to a specific technology or isolated skill - they suffer from a systemic inability to scale learning. The proposed solution is an experiment in creating a

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[1] https://www.agilealliance.org/introduction-to-the-technical-debt-concept/

[2] https://www.inc.com/brent-gleeson/5-ways-to-destroy-the-pesky-silos-in-your-organization.html

[3] Best place to start learning about Agile is: http://agilemanifesto.org

[4] A great place to start learning about Lean Software Development: http://www.disciplinedagiledelivery.com/lean-principles/

[5] Further background on Design Thinking can be found at: https://www.ideou.com/pages/design-thinking

[6] Still many views on DevOps, but this is a good starting point: https://www.atlassian.com/devops

community of learning. Such a community partakes in both formal and informal learning as discussed by Greenhow and Lewin (2016); practicing continuous learning and improvement via peer-based sharing, reflection, experimentation, connections and collaboration. As stated by Benade: “A redefined workplace requires that teaching and learning be shifted out of the confines of the traditional classroom, into hallways, common spaces and any place that can be connected wirelessly, thus becoming a place of learning (Benade, 2017, p. 805).

Marshall McLuhan (1964) is famous for stating that the “Medium is the message.” The proposed learning solution, mimics this approach where the “solution is the message.” That is, while the solution contains a specific learning topic, the true learning relates to the practices, technologies and a culture of operating as a community of learning.

The solution is further inspired by Nintendo’s philosophy, as explained by Ryan, of “…Lateral Thinking of Seasoned Technology, or applying new ideas to off-the-shelf parts” (Ryan, 2012, p. 102). While perhaps not initially obvious, this philosophy connects very nicely with Puentedura’s (2010) SAMR as technology alone is not the answer for the Bank, the answer lies in how the technology is used. The bank already has sufficient technology - they just lack the operating model for getting value from that investment.

In the case of the Bank, “Seasoned Technology” includes MS Office 365 and Canvas. The Bank is an MS Office 365 subscriber which means that technologies such as MS Teams, OneNote, SharePoint are already deployed and available. In addition, the organization has already deployed Canvas as their learning management system (LMS).

MS Teams is at the core of the solution as it is widely accessible (via computers, phones and tablets) and integrates with many other products. The communities will be coached in how to utilize the platform to connect, share, meet and co-create knowledge via wikis, sharing files and posting links. The platform further supports the community through both synchronous and asynchronous communication (direct chat, group chat, audio calls, and video conferencing). Such a broad range of ways to communicate and share is very inclusive and strongly supports Universal Design for Learning as described by Tobin (2014). The platform also integrates with work calendars to make it easy to schedule time for events (reflections, seminars, study groups, mentoring, and so on). The communities have members distributed across multiple locations - so synchronous learning opportunities need to be carefully coordinated to support a variety of time zones. The technology is also fully integrated into the Bank’s single-sign-on facility, has been approved by the internal security team and meets industry regulations.

Canvas will be integrated with MS Teams making the organization’s learning catalog accessible via MS Teams. This is particularly interesting as new micro-learning modules are deployed into Canvas. Further, micro-learning progress is easily tracked and shared. The micro-learning that is exposed illustrates to employees that short learning modules have value and invites them to create and share such content. Co-creation of knowledge is a key characteristic of a community of learning.

Establishment of continuous learning and improvement cannot be achieved only via technology. Pursing a technology solution without considering the “ecological” (Postman, 1993, p. 18) implications, as noted by Postman, is the path to failure. This is further supported by Bates (2014): ““...it would be a mistake to focus solely on the educational characteristics of technologies. There are social, organizational, cost and accessibility issues [that] also need to be considered” (Bates, 2014, p. 224). We need to consider the ecology of the organization through avenues such as organizational design, change management and a broad systems of systems perspective. As Galbraith (2014) highlights, we need to continually align and balance strategy with structure, processes, skills, and rewards.

Implementation Plan

With a potential user base of 200,000 users, a “Big Bang” approach, whereby all content for all users is deployed at once, would fail. Such an approach would take too long; delay feedback, miss opportunities for adjustments, and present an enormous change management issue. Instead, the proposed solution will roll out starting with a pilot group, and then follow a strategy of targeted waves to build a user base over time. Along the way, feedback, lessons learned and success stories will be used to drive buy-in and support.

The solution incorporates effort for building LMS hosted content, defining learning strategies for the target community, coaching the learning community, facilitating blended learning opportunities, and executing activities related to organizational design and change management. The first community to be targeted is a select group of 100 Scrum Masters, drawn from 3 Bank locations. This is a sufficiently large group to have an impact, prove out capabilities and capture valuable feedback. A series of micro-learning modules will be created to support the topics needed for the Scrum Masters to get certified with their Professional Scrum Master designation. Existing course content already exists, but needs to be refactored. A facilitator will guide the group through a blended learning experience that includes leveraging the micro-learning modules as well as group-based learning and sharing of experiences (derived from real-world application of the new knowledge). The community of learning will also be supported by coaches at each of the three selected locations. The coaches will participate in the MS Teams-based community and will also use MS Teams to coordinate face-to-face group meetups and mentoring sessions. Leadership coaching will be provided to help develop a compatible environment.

This initial experiment will be conducted over a 3 month period. At the conclusion of the experiment, results related to participation, sharing, feedback (participant and facilitator), LMS statistics and project results will be used to gauge progress, make adjustments and plan for the next experiment.

Budget

The initial experiment needs to support the following items:

1. Refactoring of existing content to micro-learning modules.
2. Configuration of MS Teams environment to support the community of learning
3. Change management plans and execution.
4. Measurement and recognition program development in partnership with HR and management.
5. Facilitation of the learning experience.
6. Coaching at each of the 3 locations.
7. Coaching management and leadership to develop a supporting environment.

The budget required for this effort will be $450,000.

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