

Theses and Dissertations

2018

The future of Chief Learning Officers in the corporate organization

Grace E. Amos

Follow this and additional works at: <https://digitalcommons.pepperdine.edu/etd>

Recommended Citation

Amos, Grace E., "The future of Chief Learning Officers in the corporate organization" (2018). *Theses and Dissertations*. 999.

<https://digitalcommons.pepperdine.edu/etd/999>

This Thesis is brought to you for free and open access by Pepperdine Digital Commons. It has been accepted for inclusion in Theses and Dissertations by an authorized administrator of Pepperdine Digital Commons. For more information, please contact bailey.berry@pepperdine.edu.

**THE FUTURE OF CHIEF LEARNING OFFICERS
IN THE CORPORATE ORGANIZATION**

**A Research Project
Presented to the Faculty of
The Graziadio Business School
School of Business and Management
Pepperdine University**

**In Partial Fulfillment
of the Requirements for the Degree
Master of Science
In
Organization Development**

**by
Grace E. Amos
June 2018**

This research project, completed by

GRACE AMOS

under the guidance of the Faculty Committee and approved by its members, has been submitted to and accepted by the faculty of The Graziadio Business School in partial fulfillment of the requirements for the degree of

MASTER OF SCIENCE
IN ORGANIZATION DEVELOPMENT

Date: June 2018

Faculty Committee

Committee Chair, Darren Good, PhD

Committee Chair, Mariam Lacey, PhD

Deryck J. van Rensburg, DBA, Dean
Graziadio Business School
School of Business and Management

Table of Contents

Abstract	v
Acknowledgements.....	vi
List of Tables	vii
List of Figures	viii
Chapter 1: Introduction and Purpose	1
Organizational Learning	1
The Chief Learning Officer	2
Research Purpose	4
Importance of Study.....	4
Thesis Outline	5
Chapter 2: Literature Review	6
A CLO’s Place in Organization	6
Title Variability.....	8
The CLO: Role, Responsibilities, & Profile	9
Organizational Learning & CLOs.....	12
Building Learning Organizations.....	13
Learning Strategy.....	16
Opportunity for Further Research.....	19
Chapter 3: Research Methodology and Design	20
Research Design.....	20

Sampling Methodology.....	21
Research Sample.....	21
Data Collection	22
Data Analysis	24
Chapter 4: Results	26
Perceived Trajectory of CLO/CTO Role	26
Approach to Driving Learning Strategy	42
Alignment with Human Resources	48
Summary.....	55
Chapter 5: Discussion	57
Theoretical Implications	57
Practical Implications.....	60
CLO/CTOs Face The Same Challenges As The People They Support.	60
Limitations	61
Areas for Future Study.....	62
Conclusion	64
References.....	65

Abstract

The purpose of this study was to explore perceptions about the future of the Chief Learning Officer (CLO) role in the corporate organization from the perspective of current and former CLOs. For this study, Chief Learning Officer is defined as the top leadership role held in a corporate organization that oversees the functions of learning and development, talent development, and/or training. This study summarizes data collected through semi-structured interviews with ten CLOs from a variety of countries, industries, and company sizes. Overall, four key themes emerged from the study: 1) a perceived trajectory of the CLO role, 2) opinions about the CLO title, 3) specific approaches to driving learning strategy, and 4) characterizations of the alignment with human resources. Suggestions for practical and scholarly implications are provided.

Keywords: Learning Strategy, Talent Development, Talent Management, Future of Learning

Acknowledgements

This research is dedicated to my grandparents, Nancy and Dr. Douglas Morningstar, who instilled in me a deep love and respect for education, and a passion for learning. With affectionate gratitude, I thank them for sharpening the curious mind of a child and nurturing that through my adulthood.

I also want to thank my sisters, Tableau community, UP Learning Group, WWW ladies, and extended MSOD family for your contributions to my thesis process and teaching me how to write like an academic. The emotional support and intellectual lessons are cherished. To my thesis advisor, Dr. Darren Good, thank you for guiding me on this process, for your patience, and for your feedback. For the second reader, Dr. Mariam Lacey, thank you for your additional time and edits to shape the final product.

Lastly, I owe a debt of gratitude to my research participants and professional community of learning and talent development professionals. This research was inspired by you and made possible by you. As we look ahead at the challenges that the pace of change, globalization, and disruptive technologies will bring to the global workforce, you will be there to help people be relevant in their careers through on-going talent development strategies. This is life-changing work. The possibility for positive impact is tremendous and the task is upon us now. Cheers to transforming the world.

List of Tables

Table 1: Model of Learning Strategy Evolution	18
Table 2: Participant Industry.....	22
Table 3: Initial Interview Questions.....	24
Table 4: Perceived Trajectory of CLO/CTO Role.....	27
Table 5: Opinions About the CLO Title.....	37
Table 6: Approaches to Driving Learning & Talent Strategy.....	43
Table 7: Alignment with Human Resources	49

List of Figures

Figure 1: A Systemic View of The Role of the CLO in The Organization.....	11
Figure 2: Systems Learning Organization Model.....	15
Figure 3: Learning Strategies in Enterprises.....	17

Chapter 1: Introduction and Purpose

Organizations, and the people who fill them, must be engaged in learning. For decades, the dominant business climate has been characterized by near constant change with technological advancements, economic and political instability, and the suffusion of globalization. This degree and velocity of change necessitates learning new skills and competencies – new skills to produce goods; new skills to navigate, manage, and lead through turbulence. In 1984, it was estimated that a skill learned was usable for sixty years (Johnson, 2017). As of 2014, the estimated viable lifespan of a skill had dwindled to two and a half years and continues to dwindle due to accelerating technological innovations and change. For the average worker, this translates into the risk of skill obsolescence, or the need for skills to be updated, every two and a half years or less. (Johnson, 2017). Skill obsolescence has a potentially profound impact on the future of learning and learning challenges are pressing.

Learning must occur at the individual, group, and organizational levels. Without engaging in learning at all these levels, the individual, group, and organization each jeopardizes its own relevance, competitiveness, and even survival. As stated by Arie de Geus, former head of Royal Dutch Shell’s Strategic Planning Group, “Most corporations die prematurely from learning disabilities. They are unable to adapt and evolve as the world around them changes,” (Baldwin & Danielson, 2000, p. 5).

Organizational Learning

Acknowledging the critical nature of learning, researchers have paid significant attention to the topic of organizational learning. Organizational learning is an organizational change that occurs as a “function of experience,” (Argote, 2011, p. 440)

such as a change to organizational beliefs, a change in ways of thinking, or a change in organizational actions and behaviors (Easterby-Smith, Crossan, & Nicolini, 2000). An important distinction exists between organizational learning and adaptation. Learning is defined as the development of insights, knowledge, and associations from experience, which can be applied to future choices (Fiol & Lyles, 1985). Whereas, adaptation is the ability to make incremental adjustments to an environment without necessarily developing insights or knowledge from the experience (Fiol & Lyles, 1985). While both are necessary, the difference is crucial. Organizational learning is core to organizational success because it is about informed response and growth.

The Chief Learning Officer

One corporate response to address an increasingly complex environment was the creation of a leadership role, called the Chief Learning Officer (CLO), to strategically direct learning in the organization. Steve Kerr is cited as the first Chief Learning Officer, appointed in 1994 at General Electric, an American-based company, by famous CEO, Jack Welch (Elkeles & Phillips, 2007; Elkeles, Phillips, & Phillips, 2017; Hodgetts, 1996; Spreitzer & Vance, 2002). Following in the footsteps of General Electric, a steady creation of the new, high-ranking learning executive role occurred. By 2000, several large corporations touted the CLO role, including: Amoco, AT&T, Federal Express, General Motors, Lincoln Financial Group, Lucent Technologies, Monsanto, Motorola, Sears, and Whirlpool (Baldwin & Danielson, 2000). Though the CLO role experienced considerable expansion across American-based, corporate organizations in the mid-1990s and early 2000s (Baldwin & Danielson, 2000), a survey from Price Waterhouse Cooper notes that by the late 1990s it was estimated that less than 100 individuals held the CLO

title (Greco, 1999). A 2015 blog, which independently prowled LinkedIn for CLO and CLO-equivalent titles, such as Global Head of Learning and Development, suggests there were, at the time of the blog publication, 1550 CLOs in practice (Fayad, 2015). This is hardly achieving ubiquitous adoption. While these studies suggest growth in the CLO role since its inception, such estimations suggest a slower, or limited, adoption compared to other C-suite positions. An early pioneer who coined the term CLO, may have predicted this adoption struggle:

Organizations appear to be a long way from making systemic commitments to learning or to institutionalizing the learning function. The idea of creating a Chief Learning Officer (CLO) can be presumed to be a rarity if it exists at all. Obviously, there are organizational expectations that there will be a chief executive officer (CEO), a chief financial officer (CFO), and a chief operations officer (COO). But there is no equivalent status, structure, centrality, accountability, or permanence for organizational learning. (Willis, 1991, p. 182-183)

Still, this lack of adoption of the CLO role across the corporate domain is confounding given the critical nature of learning in the organization that spurred its creation.

Adding to the quandary of the CLO role's lack of adoption and prevalence, is the notable gap in research. The strategic imperative of learning and the development of capabilities at the individual, group, and organizational level is burgeoning in dialogue and literature. There are volumes on topics such as, talent development, leadership development, the skills gap or talent shortage, talent management, knowledge management, and the critical need to build innovation capabilities (ASTD, 2014; Awazu & Desouza, 2004; Benko, Gorman, & Steinberg, 2014; Cappelli, P. H. 2015; Cappelli, P. & Keller, 2014; Caudron, 2003; Chen, 2015; Gallup, 2017; Kimble & Bourdon, 2008; Lee, Rittiner, & Szulanski, 2016; Petrie, 2011; Raub & von Wittich, 2004; Thomson et

al., 2017; “Today’s World-Class Chief Learning Officer,” 2012). However, literature on the Chief Learning Officer is largely confined to its community of practice and researched-based, academic literature is also strikingly limited.

Despite the obvious need for learning in modern organizations at all levels, the CLO’s learning leadership role remains uncertain. The emergence of other soft skill chiefs who are known to own similar functions as the CLO, such as the Chief Human Resource Officer or Chief People Officer (Benko et al., 2014), also calls the future of the CLO role under examination. Questions that warrant consideration and research are:

- How has the CLO role evolved and what is the perceived trajectory for functions CLOs are performing currently?
- How are CLOs driving learning strategy in organizations?
- How are dynamics with other human resources leaders impacting the CLO role?

This study intends to address the gap in the research available on corporate learning leaders, namely the Chief Learning Officer.

Research Purpose

The purpose of this study was to explore the future of the CLO role in the corporate organization through the perceptions of current and former Chief Learning Officers. In place of a standardized definition, an operational definition of Chief Learning Officer is used for this study, which is the highest-ranking person in a corporate organization designated to lead learning, talent development, and/or training functions.

Importance of Study

This research intended to generate an agenda of topics on organizational learning leadership for further academic study and practical dialogue amongst business, academic,

and government leaders. The researcher hopes this agenda inspires the pursuit of solutions to support the learning demands of individuals, groups, and organizations around the world. A sustainable future for the global workforce is one in which all organizations take an active, developmental stance for their employees and the organization, which values learning. Skilled talent and intelligent response to the rapidly changing environment are requisites to be in business; organizations need to put learning in the front row to keep pace and designate someone to effectively lead their learning and talent development efforts to do so.

Thesis Outline

Chapter 1 provided an introduction to the issue and defined key terms. This chapter also described the purpose and importance of the research. Chapter 2 offers a review of the existing literature on the role of the Chief Learning Officer, organizational learning, learning strategy, and presents gaps in the literature as opportunities for further study. Chapter 3 outlines the methodology for data collection and data analysis, as well as defines the sample population. Chapter 4 describes the study finding and key themes from the data analysis. Chapter 5 summarizes conclusions of the study and provides recommendations for further research, as well as conversations topics for business leaders to consider.

Chapter 2: Literature Review

The purpose of this study was to explore the future of the CLO role in the corporate organization through the perceptions of current and former Chief Learning Officers. This chapter will provide detailed information on Chief Learning Officers, their role in organizations, titles under which they operate, elaborate on the responsibilities of this role, and patterns in the profiles of CLOs. Following which, this chapter will examine the connection between organizational learning and CLOs, a CLOs role in building learning organizations and driving learning strategy. Due to the limited nature of peer-reviewed, academic literature on CLOs, this literature review will also include pertinent, non-peer reviewed literature to provide a holistic view of literature available on the corporate learning leader. The chapter will conclude with the opportunity for further research, which intends to support the purpose of this study.

A CLO's Place in Organization

The literature indicates the Chief Learning Officer role was created to put a learning leader in the corporate C-suite, thus elevating the focus of organizational learning to the executive leadership level. The explicit title of Chief Learning Officer began to emerge as a response to executive and managerial attention on organization learning (Willis, 1991). Willis (1991) asserted if organizations are serious about learning there needed to be a leader who is assigned to the task of strategic leadership of organizational learning. "A recognizable learning part should be clearly understood to be organizing the system as a learning culture, at times overriding all other leading parts. The perspectives of the Chief Learning Officer could thus override the perspectives of more traditional executives," (Willis, 1991, p. 185). Willis was intentional in calling for a leader at top levels to

represent learning. Different than personal power, which refers to influence, position power is the power derived from rank or position in the hierarchy within an organization (Northouse, 2013). Positional power can provide special advantages and influences (Morgan, 1997). According to Willis (1991), positional authority is necessary to strategically guide learning and requires more than adding another learning manager, director of training, or vice president of organizational learning. In a 2012 interview talking about her contributions to CLOs in the early 1990s, Willis suggested that a Chief Learning Officer *is essential*; someone with a chief-level-title, who is part of the executive team and involved in setting strategy (Short, 2012). Therefore, the founding literature posited the CLO role ought to be included as part of the top leadership team of an organization.

In practice, even when the Chief title is assigned, it appears this has failed to guarantee a seat at the executive leadership team table for the CLO. This is demonstrated in studies that found the position power inferred by the Chief title still insufficient to gain access to the C-suite (Baldwin & Danielson, 2000; Douglas, 2014; Lackey, 2000). In interviews with Chief Learning Officers from 10 major American corporations, it was shown that some CLOs helped to craft strategy with the CEO, while others were simply implementing strategy set by other leadership (Baldwin & Danielson, 2000). Additional studies support these findings, again demonstrating that the CLOs chief title did not guarantee a seat at the table with the executive team in setting strategy and that the CLO role could be one, two, or even three reporting layers removed from the CEO (Baldwin & Danielson, 2000; Douglas 2014). Building on Baldwin and Danielson's work (2000), yet another study validated reporting distance as the norm for CLOs. A majority, 65% of 92

CLOs surveyed, reported to a vice president or senior vice president of human resources, while only 35% reported to the CEO (Surgue & Lynch, 2006). Similarly, Lackey's (2000) interviews of CLOs uncovered concerns about organizational structure, perceptions about the importance of learning, and approaches by other leadership impairing the ability for the CLO to function. These studies suggest a need for the clarification of the CLO role, and for unresolved issues to be addressed that inhibit the optimal function of the CLO role at the executive level (Baldwin & Danielson, 2000; Douglas, 2014; Lackey, 2000). It remains unclear what would earn a learning leader the intended executive seat or if there are superior reporting arrangements that allow the CLO to flourish alternatively.

Title Variability

In addition to confusion about where a CLO ought to sit in organizational hierarchy to maximize effectiveness, several other chief titles associated with the CLO exist in the literature. The chief *knowledge* officer (CKO) is often cited along with the Chief Learning Officer in earlier literature (Awazu & Desouza, 2004; Baldwin & Danielson, 2000; Gehl, 2014; Greco, 1999; Raub & von Wittich, 2004). The management of the organizational learning sub-processes of knowledge creation, retention, and transfer surfaces as a key function of these two inter-related and seemingly synonymous roles, which Awazu and Desouza (2004) call the "Knowledge Chiefs." The distinguishing of Chief Knowledge Officer from Chief Learning Officers may have reflected a periodic emphasis on organizational knowledge management in the 1990s and 2000s. CKOs were mostly found to exist in the consulting and computer software industries, where knowledge transfer is demonstrated to contribute to competitive

advantage (Awazu & Desouza, 2004; Easterby-Smith, Lyles, & Tsang, 2008; Easterby-Smith & Prieto, 2008). From a scan of the practitioner and academic literature, it appears the CKO title has all but disappeared from current business usage. One chief title evolution worth mentioning is the latest iteration to the title of Chief Learning Officer, which appears in the most recent practitioner literature as the Chief Talent Officer (CTO) (Elkeles, 2017; Elkeles et al., 2017) or Chief Talent Development Officer (CTDO) (“Association for Talent Development,” 2018). It remains unclear whether the Chief Talent or Talent Development Officer title will replace the Chief Learning Officer title, how the role will remain the same or differ, what other titles may be used for the role, and the adoption implications of a new title.

Furthermore, it also appears common for some learning leaders to operate as CLOs with non-chief titles. Surgue and Lynch (2006) reported only 14% of the 92 CLOs were using the actual CLO title. Nearly 80% were using “director or vice president of learning or training,” though the authors are quick to assert they consider all 92 learning executives a CLO, “regardless of their official title,” (Surgue & Lynch, 2006, p. 53). This implies a strong possibility learning leaders are identifying with one title, the CLO, and operating under another title which is organizationally sanctioned, such as VP of Learning, and seemingly reside lower in the hierarchy.

The CLO: Role, Responsibilities, & Profile

Along with varying status in the hierarchy and a multitude of possible titles, Chief Learning Officers also own a wide scope of responsibilities in their role. The Chief Learning Officer role is broadly described across the literature as the top leadership role responsible for learning and knowledge in an organization (Awazu & Desouza, 2004;

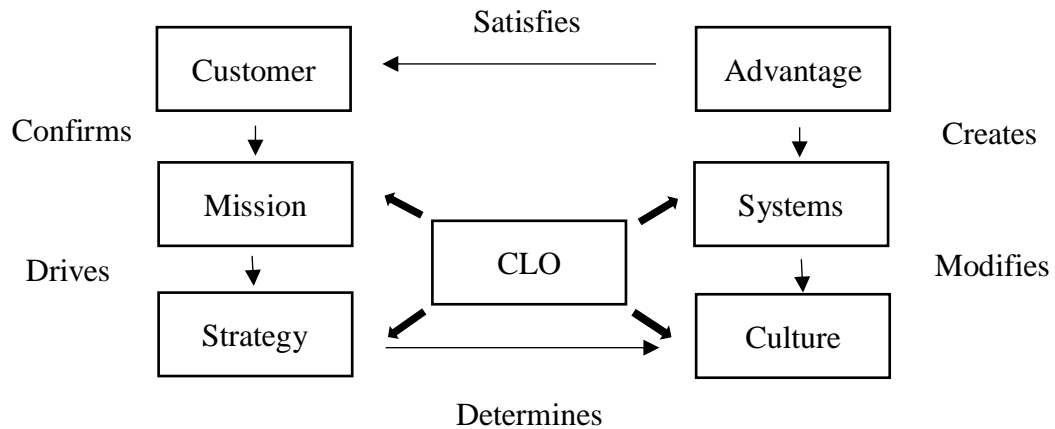
Baldwin & Danielson, 2000; Douglas, 2014; Elkeles & Phillips, 2007; Elkeles et al., 2017; Gehl, 2014; Haight, 2017; Lackey, 2000; Prafka, 2009; Willis, 1991; Willis & May, 2000). A standard definition of the CLO role remains unestablished. Of the few research studies that exist on CLOs, most of them touch on an aspect of defining the work of the learning leader. Baldwin and Danielson (2000) were the first who sought to understand what the newly minted learning executives were appointed to do. They indicated their research was driven both by an absence of research on CLOs and a criticism that “discussions of corporate learning strategy are wrought with vacuous rhetoric and abstract terminology, and it is often impossible to sift through proclamations and presentations to get at the core of what firms are really doing,” (p.5). They reported on the founding charters of the CLO’s role, ranging from leading corporate universities to driving large change initiatives. Surgue and Lynch (2006) reported primary job tasks as “strategy, planning, communication with executives and lines of business, and management of learning staff,” (p. 53). In a case study of a single CLO at a large U.S. home goods distributor, the role was connected with a three-pronged mission:

1. To facilitate learning and change
2. To improve individual, team and organizational effectiveness
3. To support business strategies and tactics through research and experimentation

This particular CLO position was designed to service a strategic resource for human resources and to provide expertise on learning (Willis & May, 2000). The CLO’s role was also characterized by this diagram in Figure 1:

Figure 1

A Systemic View of The Role of the CLO in The Organization (Willis & May, 2000)



The single most comprehensive resource on success in the role is an acting guidebook for the aspiring or current CLO, called *Chief Talent Officer: The Evolving Role of the Chief Learning Officer*. Elkeles, a former CLO and current CTO, outlines everything from historical context, key challenges, reporting structure, and organizational design for the learning functions, to budgeting and value measurement recommendations (Elkeles et al., 2017). As in the case for many roles, the exact definition of the CLO role and span of responsibility seems dependent on the organization though patterns exist around owning the learning function and associated deliverables.

Initial patterns have also emerged in the literature on the profile of CLOs. One group attempted to create a standardized, knowledge-based system of CLO selection criteria for hiring purposes based on human resource expertise, competence, and mindset profiles (Velencei, Szoboszlai, & Baracska, 2014). No data was available on the efficacy of this model. Another study examined the leadership styles common amongst learning

leaders in a corporate context. In a survey of 70 CLOs, 100% reported a transformational leadership style, characterized by caring about employee's development, others' achievement of potential, and motivating followers to higher levels of performance (Goldsmith, 2009). This study aligns with the results of a separate case study of a single CLO's leadership style, which was also reported as transformational leadership and attributed to his influence within the organization (Prafka, 2009). Prafka (2009) noted that "in the knowledge-based view of the firm, transformational leadership may aid in the creation of competitive advantages because it promotes the individual creation, sharing, and exploitation of organizational knowledge," (p.18). Exploring another facet of the CLO profile, Douglas (2014) interviewed 20 CLOs and discovered all study participants had initiated the creation of their role within an organization, exhibiting a great deal of visionary agency and apply the sociological construct of structuration theory. Finally, the gender profile seems to lean favorably towards an atypical leadership balance for corporate organizations, with upwards of 40% of CLOs being female-gendered (Fayad, 2015; Surgue & Lynch, 2006). A profile of the ideal learning leader has begun to form in the literature and is likely well-formed in practice.

Organizational Learning & CLOs

A key responsibility of CLOs is to lead and manage the practical work of organizational learning. Organizational learning enjoys an ongoing body of research and discussion. The inception of organizational learning is rooted in behavioral psychology theories applied to organizational development (Argyris & Schon, 1978; Cyert & March, 1963). Cyert and March (1963) noted organizations, like people, learn by changing their routines and future behaviors (Cyert & March, 1963). Argyris and Schon (1978) first

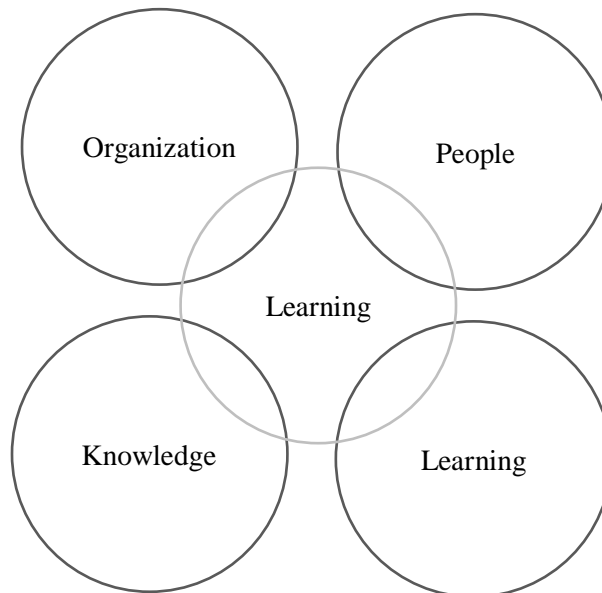
illustrated in case studies the ways in which organizations learn or fail to learn from experience, with individuals acting as the agents of the organization and contributing to a greater body of organizational knowledge. A substantial wealth of research exists on the many facets of organizational learning, garnering continued attention and academic contributions since the 1950s. Easterby-Smith, Crossan, and Nicolini (2000) point out the early organizational learning literature concerned definitions (i.e., learning vs. adaptation), types of learning (i.e., single vs. double-loop learning and unlearning), and units of analysis (i.e., the individual, the group, and the organization). Later literature and discussions examines the links between organizational learning and strategic management (Chakravarthy, 1982), performance, creativity, innovation (ASTD, 2014; Huber, 1998), and competitiveness (Dearborn, 2015; Hassell, 2017). One can imagine this dialogue will continued and learning leaders will be central, if not driving alongside academics.

Building Learning Organizations

Chief Learning Officers also work to build learning organizations. A derivative of organizational learning, systems theory, and the total quality management (TQM) movement, Senge (1990) coined the term “learning organization” to describe the organization committed to the process of continual improvement through learning. One might consider the learning organization to be a form of organizational learning in practice. With more than one million copies in print, Senge’s work undoubtedly caught the attention of business leaders and scholars. Assessments, consulting services, and awards are all available to companies aspiring to be a learning organization, many of which are advertised in the *Chief Learning Officer* magazine. For all the popularity the

learning organization attracted, the practice also received criticism for lacking clear means of measurement and management (Garvin, 1993). As learning falls under the domain of the Chief Learning Officer, the learning organization regularly appears in CLO practitioner literature, as do the associated challenges with the measurement and management of such an abstract concept as learning (Elkeles, 2017; Elkeles & Phillips, 2007; Elkeles et al., 2017).

Widely accepted measurements of learning, the learning function, and the learning organization remain unestablished. Though some researchers have attempted to link the impact of a learning organization on financial performance, claiming improved knowledge performance leads to positive financial impacts, there is much work to be done on measuring the value (Kim, Watkins, & Lu, 2017). To understand the role of CLOs in the learning organization, Haight (2017) recently interviewed 20 CLOs to explore how they used leadership and change to build learning organizations using the Systems Learning Organization Model (Marquardt, 2011). See Figure 2 below.

Figure 2***Systems Learning Organization Model (Marquardt, 2011)***

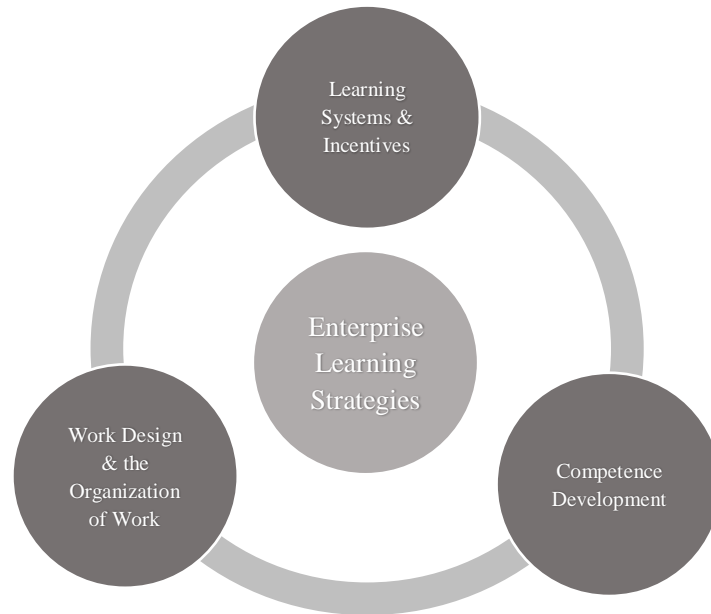
Haight (2017) discovered CLOs consistently do four things to build learning organizations (p. vii):

1. They themselves collaborate with others inside and outside of the organization, and encourage others to do so as well;
2. They assess and measure their learning and development programs on a consistent basis;
3. They seek and secure funding and other resources for their learning and development opportunities;
4. They have a vision for their learning organization, and realize that vision through strategy development and implementation.

CLOs seem to be a pivotal actor making the learning organization a reality and tying the value to the business.

Learning Strategy

Arguably, the primary responsibility of a CLO is to develop and drive a learning strategy. As with any business unit, the main objective of the CLO is to align the learning organization with the organization's mission and the CEO's vision, strategy, and objectives. Early work on learning strategy started around the time the CLO role was popularized. It spoke to the embodiment of learning organization principles, such as a commitment to continuous experimentation and to be ready for learning at "any volume, anytime,... anywhere, and anything," (Slocum Jr., McGill, & Lei, 1994, p. 46). This is a tall, broad order. In more recent literature, modern "learning strategies at the enterprise level encompass policies, systems and practices that are used in the ongoing inclusion (i.e. recruitment) and development (i.e. retention) of personnel," (Brandi & Iannone, 2017, p. 2). Based on their work studying the relationship between learning, competence development, and enterprise performance, Brandi and Iannone (2016) developed the conceptual model of learning strategies in enterprises. The model consists of three main dimensions: skills (competence) development, learning systems and incentives, and work design and the organization of work. See Figure 3 below.

Figure 3***Learning Strategies in Enterprises (Brandi & Iannone, 2016)***

Key findings from Brandi and Iannone’s work (2017 & 2016) were the need for flexible, learning-centered strategies for initiatives that respond to immediate business needs, strategies that leverage informal learning, such as social interactions and peer-to-peer learning, as well as formal learning, and strategies influenced by new learning technologies. Who better to lead this strategy than the CLO?

Discussion remains limited on the ability and influence of these learning leaders to form and execute strategy. An underlying theme in practitioner literature is the criticism that learning leaders are “order takers” (p. 42), consumed by delivering tactical initiatives, and operating without strategy (Rossett, 2009). However, CLOs have been found to drive different types of learning strategies, which vary based on environmental turbulence (Baldwin & Danielson, 2000). As environmental turbulence increases, the general focus of the CLO’s learning strategy was found to shift from (I) employee

development to (II) imminent business needs and onto (III) new business development.
See Table 1 below.

Table 1

Model of Learning Strategy Evolution (Baldwin & Danielson, 2000)

<i>Stage I: Employee Development</i>	<i>Stage II: Imminent Business Needs</i>	<i>Stage III: Unknown Business Development</i>
<i>Scope</i> Individual skill/knowledge enhancement in current business practices	<i>Scope</i> Innovation in current business practices to achieve strategic business objectives	<i>Scope</i> Business redefinition to lead industry restructuring
<i>Focus</i> Internally defined systems, procedures, and perspectives	<i>Focus</i> Customer-defined requirements	<i>Focus</i> Undefined market potential
<i>Environmental Turbulence</i> Low to moderate	<i>Environmental Turbulence</i> Moderate to high	<i>Environmental Turbulence</i> High to very high

In less turbulence, it can be inferred that CLOs were rolling out programs to support business strategy and more focused on implementation, giving possible credence to the criticism of order taking. Baldwin and Danielson (2000) discovered in the few cases characterized by high environmental turbulence, CLOs were actually partnering with senior leadership to craft the trajectory of the business and its strategy. Willis and May (2000) sought to demonstrate the CLO is central to driving strategy, though their study was limited to one organization. Brandi and Iannone (2016) called for additional research to be conducted on how learning strategies are enacted, can be calibrated to drive performance, and provide value. Research on how CLOs, or other learning leaders, affect learning strategy is wanting with much to be explored, as well.

Opportunity for Further Research

The opportunity for further research on CLOs, organizational learning, the learning organization, learning strategy, and how all contribute to organizational performance is vast. Given the breadth of opportunity, the current study hopes to address one facet of the research gap by exploring perceptions about the future of the CLO role in the corporate organization, and answering three questions:

- How has the CLO role evolved and what is the perceived trajectory for functions CLOs are performing currently?
- How are CLOs driving learning strategy in organizations?
- How are dynamics with other human resources leaders impacting the CLO role?

Chapter 3: Research Methodology and Design

The purpose of this study was to explore perceptions about the future of the Chief Learning Officer (CLO) role in the corporate organization from the perspective of current and former CLOs. While the CLO role has existed in the corporate domain since 1994, minimal academic research has been conducted on the corporate learning leader. This chapter supports this research purpose by outlining the research and data gathering methodologies, which includes the research design, sampling methodology, data measurement, and process for analyzing the data. The purpose of the study was to support the research questions:

- How has the CLO role evolved and what is the perceived trajectory for the functions CLOs are performing currently?
- How are CLOs driving learning strategy?
- How are dynamics with other human resources leaders impacting the CLO role?

Research Design

The research design was derived from the review of the limited existing literature on Chief Learning Officers, and within that literature, the emerging themes of organizational learning and learning strategy. These topics were also investigated through professional networks, connections, and the community of practice in the corporate talent development space. Based both on the review of literature and this investigation, further exploration of the role was initiated. To explore perceptions about the future of the CLO role from the perspective of current and former CLOs, a field research experiment was conducted to gather qualitative data. Semi-structured, one-on-one, interviews to facilitate dialogue were conducted to gain a deeper understanding of participant perspective.

Participants could share their thoughts, feelings, and opinions freely and without concern for repercussion, as the interview data was anonymized and confidentially secured. All identifying information was removed from the results of the study. This research design was approved by the Institutional Review Board for Pepperdine University and all requisite training was completed by the researcher prior to conducting the field research with a passing score.

Sampling Methodology

Research participants were identified as people in a corporate learning leadership role with a current or former CLO title or an organizationally-specific and equivalent title (e.g., Global Head of Talent Development, VP of Learning). True to the literature review, it was discovered there can be significant variability in titles for corporate learning leaders from organization to organization. For the purpose of selection criteria, it was necessary for the participant to self-identify as a Chief Learning Officer in his or her role, responsibilities, and own professional community, irrespective of the functional title given by the organization. Participants were selected from corporate, for-profit organizations only. Learning leaders from government, non-profit, and education were excluded from this particular study. Participants were selected from an adult population over the age of 18. As a primary sampling methodology, the researcher leveraged her professional contacts to identify participants. Additional participants were identified through a snowball sampling methodology.

Research Sample

Through these sampling methodologies, ten learning leaders were interviewed who currently or formerly held a role with the Chief Learning Officer or

organizationally-specific and equivalent title. Participants were drawn from a variety of industries as can be seen in Table 2.

Table 2

Participant Industry

Industry	# of Participants
Finance & Banking	2
Pharmaceutical	1
Venture Capitalist	1
Social Media & Networking	1
Consulting	3
Hospitality	1
Learning Technology	1

Nine of the participants listed the United States as their country of origin while one participant listed India. Six participants identified as male while four identified as female. Eight participants currently held a CLO (or equivalent) role, one participant formerly held a CLO role, and one participant held a CEO/CLO hybrid role. Five participants had held more than one CLO (or equivalent) role in their career. Four of ten participants were known by name, if not personally, by all other participants as model CLOs amongst learning leadership peers.

Data Collection

To collect qualitative data, a variety of initial questions were used in each interview. As the interviews were semi-structured, at times questions were re-ordered, re-

phrased, or expanded on the initial questions in the interviews. In the event the interviewee had a title other than CLO, questions were adapted to the interviewee organizational vernacular by changing the title of ‘Chief Learning Officer’ to reflect the title of the participant organization. Interview questions were designed to understand participant role as CLO and how it involved in the learning strategy for the organization. The questions were also designed to explore their relationship with other people-oriented leadership roles, such as Chief Human Resource Officers or Chief People Officers, as this was an energizing theme in the researcher’s investigation in her community of practice. Finally, the questions were designed to explore perspectives about the future of the CLO role, for the organization with which they identified as a CLO (past or present) and for corporate organizations, in general. Accompanying emotions and reactions were noted while the participants were answering the interview questions. Interviews were conducted through video conferencing, on the phone, and in-person. All interviews were audio recorded. For a complete review of initial interview questions, please see Table 3.

Table 3***Initial Interview Questions***

Initial Interview Questions	
1.	Tell me about your current role. What was your path to the CLO (or equivalent) role and what you generally do?
2.	When was the CLO (or equivalent) role introduced to your organization? How did that come to be?
3.	In your opinion, why do you think some organizations use the Chief Learning Officer title and others use Global Head of Learning, VP of Learning & Talent, etc?
4.	How have you experienced the CLO (or equivalent) role evolve and change in your career? <ul style="list-style-type: none"> a. e.g. title change, reporting structure change, change to responsibilities, increase or decrease to headcount or budget
5.	Tell me about how learning strategy* is formed in your organization? Who is involved? *Learning Strategy: <i>the strategy for which capabilities need to be developed to achieve company goals</i>
6.	How is your role differentiated from other people/HR-Chief roles in your organization? <ul style="list-style-type: none"> a. How have you seen other people/HR-Chief roles evolve? b. What is going well between your role and the other people/HR-Chief roles in you organization? c. Where is there conflict?
7.	What do you think is the future of the CLO role - for your organization? In general? Please explain.

Data Analysis

Qualitative content analysis was conducted on participant responses. Once the interviews were completed, the audio recordings were converted to text transcriptions and reviewed. In this process, the interview transcriptions were analyzed for key words, themes, and possible patterns or disparities across the interviews. These transcriptions were coded, and a second coder reviewed the researcher's coding system to provide inter-

rater reliability and verify the content analysis validity. Research findings were summarized and are the subject of Chapter 4.

Chapter 4: Results

This chapter summarizes the qualitative data analysis performed on the ten semi-structured interviews. The interviews were designed to explore perceptions about the future of the CLO role from the perspective of current and former Chief Learning Officers. Four key themes emerged through the content analysis of the ten interviews: 1) a perceived trajectory of the CLO role, 2) opinions about the CLO title, 3) specific approaches to driving learning strategy, and 4) characterizations of the alignment with human resources. The tables and descriptions in this chapter provide the summaries of each of the four key themes from the content analysis.

Perceived Trajectory of CLO/CTO Role

As part of the semi-structured interview, the participants were asked to describe the work of their current roles and to share their perceptions about the future of the role. Clear patterns also emerged from the interviews as to what is impacting the perceived trajectory of the CLO/CTO role, including: an expanded scope of work; technology changing work; the need for additional business acumen; neuroscience and the science of learning; world disruption and the pace of change; and the need for soft skills. Table 4 summarizes the findings about the perceived trajectory of the CLO/CTO role.

Table 4*Perceived Trajectory of CLO/CTO Role*

Trajectory	Message	Example	Frequency
Expanded Scope of Work	Learning leaders are describing their work as Talent Management, which includes training, leadership development, succession planning, performance management and a close alignment with recruiting. Scope of work is more than just learning or training.	“The role, in essence, was also expanded. So it takes a bit, became a broader role in the sense, it wasn’t just learning, it was all of talent, it included talent management ... succession planning, expanded roles in leadership development, the quarterly talent review, and then all of the delivery of trainings...”	10/10
Technology Changing Work	Technology has, and will continue, to change work and learning.	“It really is about technology and the change in the work and the workforce because of technology.”	8/10
Business Acumen	Increasing business knowledge is a critical need for the future.	“You cannot make an impact in the learning space until you understand the business.”	5/10
Neuroscience & Science of Learning	Investment in the science of learning.	“People ... are going to have to be specialized in aspects of neuroscience, about learning, psychology ...”	5/10
World Disruption & Pace of Change	The world is changing and being disrupted at a rapid pace . These leaders have a role in helping to prepare the workforce for that.	“What are we doing to attract, develop, and retain people in this very disruptive world that we’re living in?”	4/10
Soft Skills	Helping the future workforce develop soft skills.	“The soft stuff. The behaviors that machines will never be able to replicate.”	2/10

Expanded Scope of Work. Participants spoke at length about the expanded scope of the nature of their work. All participants indicated the scope of their responsibilities had grown as a learning leader, namely that their work was more than driving learning and training. Participants repeatedly described their function, not as learning or development, but as talent management and went on to enumerate the expanded responsibilities:

I manage the people function connected with employee development, which includes everything from onboarding new employees to leadership development, executive coaching, and the development of internal people. Also on talent management, we own the performance management process ... the review process and employee engagement. There is specifically a team that manages learning here, but it's not the only team I manage. It just happens to be part of the [talent management] function.

In the words of another participant:

The role, in essence, was also expanded. So it take a bit, became a broader role in the sense, it wasn't just learning, it was all of talent, it included talent management ... succession planning, expanded roles in leadership development, the quarterly talent review, and then all of the delivery of trainings as well that we do in the field and, of course, what we always do, which is the design and development of all of that learning, as well.

Another participant explained the evolution of talent management meant less leadership development programs, and more 1:1 coaching executives and leaders as well.

Five of ten participants talked about the expanded role in talent management and added thoughts about the Chief Learning Officer versus Chief Talent Officer or other titles, which will be explored in more depth in the subsequent section of this chapter. One said:

There's an interesting distinction between Chief Learning Officer and Chief Talent Officer. Learning is really focused on talent development, and Chief Talent Officer is focused on talent development and talent management. I am focused on talent and talent development, talent management, [and] I have a huge focus on talent acquisition as the Chief Talent Officer. I've helped with our talent management

process ... we worked on our first talent review for our company, and worked on what were the capabilities that we were wanting to develop, what are the values we have that we would like our employees to emulate and that's the development for our employees. I also participate in coaching and mentoring senior leaders in the organization. I do a lot of things. Anything that has to do with people and culture in our organization, because we are small.

A second participant spoke to how the CLO evolved into the "Chief Talent Officer and then performance and talent and diversity and everything was under that, or what went with it."

Of the four participants who framed the expansion of the scope of work along with qualifying their title, three were veteran CLOs who had each spent 20+ years in CLO roles.

One explained:

I was running everything from leadership development, org development, talent management ... there were thousands of different programs. They called me the Dean of [Company name removed]." The participant also oversaw, "a global team, all learning technologies, as well as communication ... and managed our corporate library.

That person is currently in a role with the title of Chief Talent Officer. The other said:

If you look over time, at least in my career, I've spent time in roles that were called CLO roles. I've spent time where I was the head of learning development. I've spent time where I was the head of learning and organizational development. I've spent time where I was the head of diversity and inclusion. I've spent time where I've been the head of talent management. And so the different components of really all those aspects of work, that in different organizations get aggregated together or not.

The last veteran learning leader said:

My current title is Chief Learning and Leadership Officer. The reason that's important and distinctive is because when I decided to take this role, I would only take it if it included things that I thought were essential to the goal. It [the responsibilities] include learning, but it also includes performance management, succession management, and leadership. Often times, you'll find companies separate those things. Across my career in different roles ... I've been a Chief Learning Officer three times now... I learned that you really do need to have a

systemic view of talent and performance, if you're going to help an organization succeed in their goals and in their vision.

Participants continued to frame the expansion of the CLO/CTO work in terms of the employee life cycle and a systemic, or holistic view, of talent management. Here are three examples:

A few years ago, we started seeing this really early integration of talent acquisition into talent development and talent management ... in five years there may be only one person is responsible for all of talent... There won't just be a Chief Talent Officer leading management and development. It will be the entire life cycle.

What I think is interesting is the whole life cycle from attracting, acquiring, assessing, selecting, development, and managing talent, that's actually becoming the whole life cycle that is looked at ... there really aren't defined lines anymore between development and management.

If you think about the life cycle of what's the most important part of HR ... it's around attraction development, and retention," and the participant sees the CTO has a hand in all of that. Attracting talent through "employment brand." "You're in a role of development people ... and then you're also focused on retraining that talent, so if that's employee engagement or productivity, or performance and growing people.

The third participant above had also seen the CTO role similarly evolve and expand by:

...touching many other parts of HR, like employee engagement. It's not just, I own training, I own learning. I own the responsibility of 'How do I keep employees engaged?' ... a holistic talent perspective around A. Understanding the talent that we have, B. Understanding the talent that we need, and C. Really figuring out how do we engage those people so that we are really disrupting other businesses and are successful... which is really overall talent management," using "talent analytics.

Four participants elaborated on the expanded scope of work in terms of a perceived increased in influence and impact on the organization:

I have seen it evolve for myself in relationship to both understanding the system of talent and creativeness. Right? So as I've matured in my experience, I both see that connection and I ask for that responsibility because I know if I have that responsibility I'll be able to have a larger impact on both the system of performance, but also no the employees' experience. I'm learning about performance

management and career frameworks in a different way. I am helping the business to scale. It's the biggest job I've ever had in terms of scope of influence.

What we're trying to do is help build a business and in order to build a business you really need to focus on talent.

A third participant who talked about impact discussed how s/he were "responsible for driving cultural transformation and behavioral change." A fourth participant described the work as "Evangelizing the future of learning. [Company name removed] is my optimal scenario for org design because I'm the Chief Learning and Talent officer," and was able to drive her own philosophy on learning and talent management.

Technology Changing Work. Also perceived to be impacting the trajectory of the CLO/CTO role was the way technology was changing their work. Eight of ten participants mentioned the influence of technology, data, and analytics and how that was shaping how they thought about their role. When asked about the future of the role, one participant said, "It really is about technology and the change in the work and the workforce because of technology." Other examples:

We can't be arrogant enough in our learning worlds, in internal organizations, to believe that we have the answers. Especially, in a day and age when most people can find the answers by doing a Google search on any topic or watch a YouTube video on any topic. We're almost unneeded in some ways. What we potentially could be to an organization, differently than what we are today, are more curators of content, rather than creators.

I really do believe that the use of technology, the leveraging of data and analytics, is untapped right now. I think if we can get our [learning and development] act together, and we need to, I think that's when we'd really be able to impact our position in a much more powerful way.

I think the other piece that's evolving and shifting because of data is the importance of analytics and the information that's behind, from an analytical perspective, all the data and information we have about people, our workforce.

I'm very excited about what the future holds and I think it's very exciting that learning and technology go hand in hand and that from a learning perspective,

[technology] is so integrated into your daily life that I think that learning is happening all the time... it's anywhere ... it's all around us ... it's embedded in everything that we do.

How do we have corporate organizations keep up with the rapid pace of change when technology that they have at home actually is probably better than the technology that they have at work.

A seasoned tech company CLO/CTO seemed ahead of the analytics curve and shared in detail about engagement dashboards in which the participant could measure and track the engagement of all employees with the learning platform they had created. What this participant described was the ideal that other CLO/CTOs were aspiring to in leveraging technology, data, and analytics.

The theme of technology changing work also influenced where learning sat in some organizations and what the focus of talent management meant to these CLO/CTOs:

We're seeing with some clients ... that they're creating innovation organizations and they're putting learning into the innovation organization and part of that drive is coming from the fact that data analysis, big data, and technology are playing such a bigger role in the learning strategy for a company. And that the skills gap work and the important of understanding skills gaps in companies and how crucial it is to the success of companies moving forward.

We can't manage content based on the internet, and everybody is getting information everywhere, so it's really about how do we help people become better in their roles and ultimately increase employee productivity and performance, which in turn increases company performance and productivity.

Participants spoke about technology changing their work and the workforce they support with a great deal of energy, urgency, marvel, and even some anxiety. While no participant used the word irrelevant, there was an underlying tone consistent across the eight interviews that mentioned needing to pay serious attention to the influence of technology on their work or risk irrelevance.

Business Acumen. A need to invest in particular business skills and business acumen also informed the perceived trajectory of the future CLO/CTO role. Five of ten participants mentioned improved business acumen as request for the future CLO/CTO. One of the participants stated, “The learning leaders that they’re hiring will have more of business focus, as well, rather than just an HR focus.” Some of these participants built off the impact of technology changing work and indicated the need for product management and technology skills, because the “customer is the learner.” Another included the need to have business acumen specific to IT (information technology), “I think people within the development space will have to have far more knowledge of IT, technology, as well as analytics, to be effective.” Others went on to elaborate about business acumen as digital marketers. “I think we [CLO/CTOs] are becoming marketers.” Needing to understand their target audience and communicate their value. “The planning, the selling, the communicating.” Another participant discussed financial acumen:

I just really want to stress the whole understanding of financials of the organization and understanding the business strategy and really adding credibility to the role as being more strategic by having that understanding ... it’s just becoming more important as People & Culture [the function] become more important.

Participants who mentioned building business acumen were direct, concise, and adamant about it. In the words of one participant, “This is significant. Put this in your thesis. You cannot make an impact in the learning space until you understand the business.” These participants were convinced that improving business acumen was essential to a positive future trajectory for the CLO/CTO role.

Neuroscience & Science of Learning. Five of ten participants mentioned neuroscience and the science of learning informing the future trajectory of the CLO/CTO role. The comments were brief, often just one word or phrase, and almost in passing as

they moved on to the next topic. One participant said, “Of course, there are people that are going to have to be specialized in aspects of neuroscience, about learning, psychology and other things.” Another mentioned they intended to pursue a PhD in neuroscience after their time as a learning leader had come to an end in corporate. A passing mention from another participant was “...there’s a whole neuro-leadership institute now that does all that stuff,” referencing brain science. The impression from these five participants was that neuroscience and the science of learning was important to the trajectory of their role, yet the influence was more intellectually advanced and subtle than the burning hot issues of technology and world disruptions.

World Disruptions. Four of ten participants acknowledged the pace of change and world disruptions as influencing the trajectory of their role. The shared sentiment was “The world is changing at a crazy, rapid pace,” and a desire to help the workforce. A seasoned CLO/CTO spoke to “disruption and transformation is happening,” and listed several industry examples of disruption, such as AirBnB and Uber, and the digital transformation. They claimed, “What are we doing to attract, develop, and retain people in this very disruptive world that we’re living in? I’m not sure that everyone is prepared for that.” Adding to this pattern in the words of another participant, bringing in the need for organizations to be agile in the disruption:

As the world becomes much more disrupted and we have to have organizations that need to be far more agile, I believe the need for learning and development of individuals will increase and be accelerated. And because the need for knowledge will be occurring at such a rapid rate, I don’t think organizations will be able to handle this by firing staff that don’t have the right capabilities, then hiring people that do. And so it is going to be a greater need to develop existing staff in an active way to keep up with the disruptions and changes... I think that organizations that have that view, will clearly have the need for a Chief Learning Officer, or whatever you’re going to call the position. Those that don’t have that perception, may not.

The same participant went on to say...

I believe all of the work, the bodies of work we're talking about, need to be effectively integrated so that they all have direct impact of the development of individuals, the management of your talent and trying to make sure the organization can be as agile as it needs to be given all the disruptions that are coming at it.

Yet another participant built on the potential impact of technology on the future of the CLO/CTO role and pondered about the disruption of technology in the workforce and adapting for "the gig economy." It appeared participants were attempting themselves to think about how to adapt to disrupted world of constant change and still musing on the idea of how to prepare entire workforces or organizations for this "crazy" world. Whereas technology seemed to pose more of a threat to the trajectory of the CLO/CTO role, a disruptive world seemed to create an opportunity to help and be of even greater value to the organization, as demonstrated by the quotes in this section.

Soft Skills. When asked about the future of their role, only two of ten participants discussed developing soft skills. One stated, "Maybe part of our objective is to connect people in a way that modern technology is robbing us the experience of." The same participant went on to describe:

Potentially, the future of learning is about how we elevate our game to create unique opportunities for human beings that machines can't replicate. The soft stuff. The behaviors that machines will never be able to replicate. Empathy, care, love. Management stuff, like nurturing the spirit of people.

The other participant referenced helping the future workforce build, "STEMpathy; science, technology, engineering, math, and empathy," capabilities and added that "Learning will be universally available. [CLO/CTOs] can't compete with Google." Both times soft skills were mentioned, it was mentioned in contrast to technology and about helping the workforce develop something technology could not displace.

Opinions about the CLO Title

Participants offered strong and varied opinions about the CLO title. All ten participants were asked directly for their opinion about the CLO title as part of the semi-structured interview protocol. Title variability was noted in both the literature review and the subject recruiting process. All participants self-identified as the Chief Learning Officer, which was a requirement for participating in the study. All participants also shared an opinion about the CLO title. None of the participants currently held a role with the actual Chief Learning Officer title, which meant at the time of the interviews all participants held a different, functional title other than CLO.

While only one of seven questions in the interview was about participant opinion on the CLO title, participants talked about their opinions of the title throughout the interviews (Table 5). Participants were often discussing titles when answering questions about perceived trajectory of the role, including their expanded scope of work and future challenges, driving learning strategy, and the relationship with HR. When asked directly for their opinions about the CLO title versus another title, they expanded on their opinions about titles for the Chief Learning Officer. The opinions about the CLO title can be categorized as: as different companies, different titles; a call for needed title reform; a top title attracts top talent; and CLO is a trendy title. This section provides supporting quotes and qualitative data from the content analysis for each categorization.

Table 5*Opinions About the CLO Title*

Opinion	Message	Example	Frequency
Different Company; Different Titles	Each company is different and will use a title that suits its structure and commitment to learning.	“Companies are different ...” “Every CLO role is different.”	5/10
Title Reform	In many cases, the CLO title is insufficient.	“The title today is more about talent, so we don’t manage learning anymore, we really are managing talent.”	6/10
Top Title Attracts Top Talent	The Chief title helps find talent and be found as talent.	“You’re trying to attract talent.”	3/10
Trendy Title	The CLO title is a socially-constructed trend.	“I think it’s a trend thing.”	3/10

Different Companies; Different Titles. Opinions that fell into this category were said the most calmly and with a level-headed tone that every role and every organization is different in their commitment to learning and attributed title variability to these differences. Five of ten participants shared a similar opinion the title was unimportant and is specific to the organization. Some responses were:

Every CLO role is different.

Companies are different ... I think [the title] depends on the company structure and where [the role] lives.

I think my opinion would vary depending on the organization’s commitment to learning. If it’s strong like at [company name removed], it doesn’t really matter what the title is.

You'll notice that... the people who get on *CLO Magazine* don't always have the title CLO, but the way they qualify people to be on the cover is whether they're the highest-ranking learning leader at their company because the title isn't always used.

This interviewee reported directly into the company president and was involved in strategic planning for the organization. The participant went on to imply if an organization is less committed to learning, then maybe they need a "Chief Learning Officer" or "Chief People Officer" title to "have a seat at the table with the executive team they previously haven't." Again, in their current roles and organizations, none of these leaders held actual CLO titles though they all self-identified as CLOs to participate in the study.

Title Reform. Six of ten participants were of the opinion that CLO title was inaccurate to represent the work, status, and even geographies of learning and talent leaders. A participant, one of the career CLO/CTOs, gave a nod to the differences amongst organizational title conventions and also offered the opinion that the CLO title was 'bad' because it is misleading about status and formal power in the organization:

Many organizations will have a Chief Learning Officer positions, but it will not be labeled as such... To some degree, the Chief Learning Officer title, I think is good, but it's also bad because usually, when you have a position that is labeled chief, that implies that the position is probably the executive leadership team of the organization. And I think in very few cases is that true for the Chief Learning Officer position. So, I think we have to be even careful with [Chief] terminology.

In the words of another career CLO/CTO, "Now, I'm not trying to throw punches, but what I would say is that [the title] is not necessarily what it appears to be." This participant was referencing past roles in which the scope of influence was limited even though they had the Chief title. Yet, another career CLO/CTO reflected on why the role was created and given the CLO title, at the time:

We put a stake in the ground around saying learning is important and to have a Chief Learning Officer kinda gave it that stature to really also emphasize its importance in the organization and its connection to the business.

However, for the current state the same participant offered the opinion that, “It’s no longer the CLO, it’s the Chief Talent Development Officer, which again, I think, is a broader definition of broader nomenclature.” A fourth career CLO/CTO carried on the opinion that CLO is inaccurate for today’s work, which is more about talent than learning. They said:

The title today is more about talent, so we don’t manage learning anymore, we really are managing talent... It’s really around, again, that life cycle of attract, results, and retain... The best talent executives are going to be the ones that have a really good understanding of the talent that they have, the talent that they need, and how to develop people and retain them and get them there. I do feel like the differentiator is somebody who things more holistically about talent as a whole, instead of ‘I do learning, I do training.’

Adding to the opinion in the vain that the Chief Learning Officer title was irrelevant, outdated, or inaccurate, other participants shared facts such as, “No one had been called a CLO in this organization in seven years.” Meaning the organization used the CLO title, eliminated it, though kept the role, which was now referred to as the Global Head of Learning. Another participant was of the opinion that no one uses the CLO title outside of specific geographies. The participant noted the absence of the CLO title in Asia, Africa, and Europe (outside of the UK). The participant believes, from their own research and experience, the CLO title is “concentrated in the US, UK, and Australia.” The participant went on later to say that the title essentially did not matter in their specific geography because it was a strictly hierarchical culture. It was understood this to mean a Chief title would not be given to someone who was not part of the executive team.

That same participant requested, “Please, expand the definition of CLO,” in the research, so as to expand the audience who might think this work was relevant. “You fundamentally wanted to see that learning is going to change. A person who’s steering the ship of learning, how [are they] going to steer it?” The participant expressed concern that by using the CLO title in the research, it may inadvertently deter participation or interest in this study. “If I was the person who was actually trying to help you in your research” and saw the CLO title, they could have responded “this is not my piece of cake.” This participant was uniquely determined in pursuing participation in the study and the only one of ten participants to seek out the researcher to secure participation. The participant came prepared to the interview with pages of their own research and notes, taking the call late into the evening. They were insisting that the researcher hear the story from someone in a culture where the participant owned CLO responsibilities, but could never conceive of receiving a Chief title. The researcher was surprised and impressed by the participant’s dogged pursuit and preparation. In all, these six participants shared a similar opinion about the need for a new, or different title, characterized by the CLO title’s limitations and inaccuracies.

Top Title Attracts Top Talent. Three of ten participants offered the opinion that Chief title could be used to attract top talent. In their words:

First... how important is learning and development and talent to the CEO? And the CHRO... if you’re in an industry where you are a top company and you want to recruit ... you can use that title to acquire better talent.

Well, I think that depending upon the type of company... you’re trying to attract talent. Sometimes you’ll put a title up there.

Another participant also indicated the title varies significantly across companies.

“It’s all the same. I mean, it’s just a title. People get bogged down in titles.” They also

mentioned, “I’m seeing the slash... The Global Head of/Chief Learning Officer,” and went on to speculate this slash was about “SEO” (search engine optimization) and self-promotion. “I think it [the Chief title] gives them weight.” These opinions were characterized by the notion the Chief title could help attract talent or be attracted as talent.

Trendy Title. Still, others shared the opinion characterized as the Chief title was a trend. Three participants fell into this category. One participant used the word “trend” in their opinion about the CLO title and, again, shared their caution that the title was inaccurate. They said:

I think it’s [the CLO title] a trend thing. I think companies ... see organization that have Chief Learning Officer, they get kind of jealous. Like, oh, I’ve got to have one of those. And the idea that ‘Officer’ is in the title is I think to some attractive, but when you really scratch the surface of that, I’m not sure that it’s necessarily accurate in this respect.

Another had the organizational context for when the CLO role was first created at their company to offer insight into a consultant’s involvement. This participant owned their opinion as an opinion, not fact.

I don’t know, but I can speculate. And the speculation is that when they were doing that review, what the current state was, they were doing it with some external support, and that support was actually coming from Deloitte. So, I’m willing to bet that they were probably influenced by some of their recommendations or terminologies from Deloitte.

Last, was the hybrid CEO/CLO participant who revealed a dual-role in the interview. “I’m the CEO of my company ... I am also the CLO.” The participant went on to describe how they oversaw all of the hiring, talent management, managed an L&D staff, and even lead project management for client deliverables. The participant’s clients are “Heads of Learning,” which the participant *did not call* CLOs. The participant called themselves an “acting CLO.” While this participant was one of the five participants who

shared the opinion that titles did not matter, the participant used the CLO title to market themselves and was the same participant who made the “SEO” comment. A fact that suggests the participant saw the CLO title trend and leveraged it to their advantage, including being selected for this study. The researcher had mixed feelings about including this participant’s interview in the study as she felt manipulated by how the participant used the title. Ultimately, the researcher decided to use the data because the participant’s scope of responsibilities and self-identification as a CLO qualified the participant. How the participant chose to use the title also highlighted the CLO title is trendy and not always accurate. Everything is data.

Approach to Driving Learning Strategy

Interview participants were asked direct questions about how they were involved in driving learning strategy and who was involved. Their responses could be categorized into three approaches: as a partnership with business leaders; holistic; and as gathering input at all levels (Table 6). This section outlines the content analysis on the approaches participants take to driving learning strategy.

Table 6*Approaches to Driving Learning & Talent Strategy*

Approach	Message	Example	Frequency
Partnership with Business Leaders	These talent leaders are taking business leaders through a process of understanding the talent and talent capabilities needed to deliver on their business goals.	“I’ve sat down with our leaders, understood their strategies, participated and sort of got in the mess with them, understanding what it is they are trying to accomplish.”	8/10
Holistic	Driving strategy to support the employee life cycle, including workforce planning research.	“I believe the development of individuals needs to be very holistic.”	6/10
Input at All Levels	Collecting feedback and research data from all levels of the business to inform learning strategy.	“Everyone is involved. Literally everybody.”	3/10

Partnership with Business Leaders. Eight of ten interview participants indicated a degree of partnership in their approach to driving learning strategy. When one participant was a Chief of Staff to a “Chief Learning and Talent Officer” before becoming a CLO themselves, they stated:

I worked with the Chief Learning and Talent Officer to carve out a strategy for how we would staff, how we would really work with the [business unit] leaders on helping them design their organizations, to craft the right targeted learning, and the ability to both identify, invest in, and track high potential talent for succession.

In the words of other participants:

I hope that the trend is moving in the direction that I’ve moved in, which is my responsibility is not just to sit and wait for the training order to be submitted, but to sit down with the leaders of the organization, work through with them, be a partner with them, solving the performance and succession issues that they have through the vehicle of learning, right?

The learning strategy at [name removed] was drafted by me through a consultation with the CEO and the CEO's direct reports [13 people]...Then there was a subset of around six people that was just a learning committee, that was my governance body... I would meet with that governance body once a month. And that would be a combination of updating any aspect of the strategy as well as reporting how it was taking place and getting alignment and making certain decisions.

We started with understanding the business, and essentially, went around asking the business leaders before we created any content, what do you care about. Not what do you care about in the learning space, but what do you care about as a leader of business. Once we had enough data that started to look like themes, that's when we could start making suggestions about the content that we built in development, to support learning.

This participant seemed quite proud of their strategic alignment in the partnership with a business leader, commenting that one business leader,

...has a particular goal to have double digit growth in these key accounts. And my job is to help her and those account teams pursue that and to execute on it. And we've been doing that, actually quite handsomely, for the last two years.

That same participant expounded on the partnership approach, giving a sense of providing value and education to the business leaders in driving learning strategy. To this end, they said:

So when the CEO releases [their] priorities, which then [their] direct reports execute on, and [their] direct reports are basically my clients. I sit down with them and talk about how they want to accomplish those goals and what they are going to need from a skill capability perspective. Now sometimes, they know what they need. And a lot of times, they don't. And sometimes they think they know what they need, but they really don't. And so part of my job is to help unpack all that. And then also contextualize it into the system of performance.

As part of the partnership approach, this CLO was also putting the learning strategy in context. Strategy in context was characteristic of the holistic approach to driving learning strategy, as well.

Holistic. Six of ten interview participants described a holistic approach to driving learning strategy. Some participants used the word “holistic” while others used “system” or “life cycle.” In their words:

I believe that the development of individuals needs to be very holistic. It all has to be united under some sort of human capital management strategy, therefore aspects of learning and development and talent management, performance management, all that really needs to be effectively bundled together.

You take the business strategy and you pull out every piece of that business strategy that has to do with people and culture... So out of the business strategy, every piece of the people strategy comes out and then you can divide it into what part of the talent life cycle that's on. Then you put together a plan, then you execute, then you measure it.

I've been working closely with the head of that area to both create a go-to-market strategy and then to help her execute on it through capability building, through performance management, through succession, through careers. So it's a system.

One participant described the life cycle as looking at what employees need to be successful in their current jobs and next career moves. They said:

At [name removed], I would say that 70% of my role was creating a learning strategy for employees ... what that mean was let's look at how we can help all of our employees get the learning and build the skills that they need to be successful at the job that they have or get ready for their next or get ready for their next opportunity.

As part of a holistic approach, participants also referenced using additional data, such as workforce planning data, to inform their learning strategy. In the words of participant responsible for serving a globally distributed workforce:

Let's just look at workforce planning ... What type of employees will [name removed] be hiring over the next five to 10 years? What locations will [name removed] be occupying? What's [name removed] competition? What's the average tenure of employees right now? What's the succession plan? What's the retention like?... If we have answers to questions like those, we will have a better understanding of the learning strategy that should support the business, today and tomorrow.

Likewise, another participant who worked in a large, mature organization also described a holistic approach to forming learning strategy by using workforce planning data, economic research, and geopolitical information that came from a designated strategy department. This informed the participant's entire strategy, including the talent pipeline this person was responsible for helping to develop in emerging markets. The holistic approach meant looking at the talent life cycle and incorporating additional data, in addition to the partnership with business leaders.

Input at All Levels. This approach to driving learning strategy was characterized by inclusivity and collecting input at all levels of the organization, not simply from business leaders. Three of ten participants described this approach. When talking about the process and approach to forming their learning strategy, one participant said, "Everyone is involved. Literally everybody." This was an evolution to their learning strategy process. The participant described the former process as top down, being dictated from executive management and business leaders. Now, the learning strategy is formed using "grassroots" information from all levels of the business. This approach was reflected in interviews with other participants as well. In another's business, "The executive team is really involved in [learning strategy.] I mean, learning strategy is based on your business strategy." This participant went on to describe the partnership approach of working with business leaders to define metrics goals and then building a development plan alongside that to drive performance that was approved by the management team. At the end of her description, she also described a process of "interviewing hundreds of employees" and business unit leaders to get a plan that was built "from the top as well as from the bottom."

A particularly progressive participant shared their approach to learning strategy:

Part of the strategy for [company name removed] learning strategy was to first communicate a philosophy. This is how we think about learning at [company name removed]...Once you have that philosophy, then you decide what things are important to the company to drive,” and that gets communicated through what the participant described as “skill plans.”

These plans are owned by the individual employee and connected to career development goals, which the employee ties to company goals. What was unique about this participant’s approach is the company of 150 employees was also orchestrated largely on self-managed work design principles. The CEO would communicate the vision, overall strategy, and company goals. Then the CEO would ask employees to self-assess the alignment and impact of their work. In that communication, the CEO would direct any questions on the learning philosophy and approach to the participant. It was understood the participant’s role in driving learning strategy was to be as much an educator as a driver. This participant’s culture and learning philosophy are characterized by high empowerment, autonomy, and collaboration with employees. The learning strategy approach of input at all levels translated to putting the ownership for learning strategy into the hands of employees, as well as leadership. Employees were being asked to look at the goals for the business, their own career goals, and self-assess what capabilities and skills they needed to build to help achieve those goals. Management was available to help guide that process. For reference, this was the same participant who described their role as “Evangelizing the future of learning,” and this inclusive approach to driving a learning and talent strategy may be part of that future.

Interestingly, the three participants who mentioned the input-at-all-levels approach were all female-gendered. No male participants indicated their approach to

creating a learning or talent strategy included anyone other than designated business leaders, workforce planning, or strategy groups. This approach to driving learning strategy meant getting input at all levels of the business, especially the front-line employees.

Alignment with Human Resources

Participants were asked to describe their relationship with Human Resources, or other People-related leadership. If the participant did not offer it in their initial response, the participant was asked to talk about what was working well in the relationship and where there was conflict, if any. Responses to these questions characterized the alignment as: sub-optimal and inhibitory, collaborative and operating as integrated talent management, and as a non-issue because the traditional human resources function had been dismantled in the participant's organization (Table 7).

Table 7*Alignment with Human Resources*

Alignment	Message	Example	Frequency
Sub-Optimal & Inhibitory	Alignment with HR perceived as a somewhat of a barrier to success.	“They [CLO/CTOs] are thinking their organizational structure precludes them from actually realizing what they or should do.”	7/10
Collaborative & Integrated Talent Management	Roles are clear and the functions are aligned to provide an integrated experience for the employee.	“We’ve tried to find role clarity in support of the employee experience. It’s not about us, it’s about the employees.”	7/10
Dismantled HR	Alignment was non-issue because traditional HR functions were dismantled and redistributed in the business.	“...the optimal org structure at [Company name removed] is what I would love to see at more companies. where the Chief Learning and Talent officer reports to the CEO and then you have the CFO actually have all the other [administrative components of HR].”	1/10

Sub-Optimal & Inhibitory. Seven of ten participants talked about the alignment with the Human Resources function sub-optimal and inhibitory to some degree. The emotional tone of this part of the interview was frustration. As to why, one participant said, “I think the lines between the classical functions that exist within Human Resources are blurring,” including who owns learning and talent development and drives that strategy. One participant started by talking about the organizational design and reporting structure of the alignment between the people functions in the organization. They said:

Recruiting is one people function. Talent management is another [people function]. Human resources is another. In full transparency, it’s not really designed that way in any strategic goodness ... Three different leaders. Three different functions. Each of the three functions reports up to a different member of our executive team.

The participant went on to indicate that even though the executives work well together, the participant believes they might be “sacrificing efficiency, strategic alignment, and agility.” The participant added:

When I first joined [three years ago], the three people [recruiting, talent management, and HR] functions were fairly territorial about their work and their content. There wasn't a lot of cross-over...Up until probably a year and a half ago, I think maybe there was a little turf war going on between those two groups for that work [training and coaching]. Probably, in some pockets, there still is.

Turf wars became a theme across interviews. This participant talked about the turf war in terms of resources:

There is a turf war there [between CLOs and HR]... it is about how many resources you control. Okay, so as the CLO gets closer comes closer to the business, [they] are seen as a red flag by the HR head. [The head of HR] would not like [the CLO] to have omnipotent control. [The Head of HR] would like to leave [the CLO] under the [CHRO]. That is a fundamental shift that shifts to happen as we go forward [to end the turf war].

In the case of another participant, they sub-optimal alignment was about accountability. In their words:

Overtime, there was an encroachment or an overlap between that person's accountability [People Excellence team] and my accountability. To the point where it actually became quite dysfunctional... there was actually almost a duplication of effort or a lack of alignment that I was very concerned about and very vocal about. To be honest, it was probably never fully resolved.

At the time of the interview, the participant had since left the organization. The participant's role was eliminated by the CHRO and there was palpable anger and a sense of injustice in telling the story, even as the researcher believes the participant was doing his best to be polite and courteous towards a former employer that had been the home of a long-chapter in their career.

There were similar views on the sub-optimal alignment with HR, including doubts about the skills of HR leaders to oversee learning, additional challenges with the CHRO

relationship, and being “blocked by HR business partners.” A three-time CLO/CTO and technology company executive, shared:

I’m a little controversial in this probably, but I think [HR] is not necessarily the best place for a CLO... I don’t believe that most HR organizations have the skills and the capabilities to really drive a forward thinking learning strategy, that includes learning technologies.

In one company, the participant reported directly to the CEO for a time and “It was awesome to have his input directly,” and then would go on working directly with business leaders on their learning strategies. That only lasted for eight months, then the organization hired a CHRO and the participant was moved under that person. The participant talked about being blocked by HR business partners, with a tone of rightful indignation, when trying to form the participant’s learning strategy. The participant acted out the dialogue of, “Oh, you’re not allowed to go and talk to the business leaders anymore. You have to go to the HR business partner and then they’ll talk to the business leader about what the learning strategy is.” The inhibitory alignment with the HR business partners contributed to the participant’s departure from that organization, as well.

Stories of sub-optimal and inhibitory alignment with HR and HR business partners continued. In the words of two participants, referencing the dysfunctional alignment between HR and CLO/CTOs:

That’s not uncommon. A lot of companies where that’s the flow, yet the HR business partner doesn’t have any knowledge of learning. Then that’s where the [learning] organizations become order takers because [the HR business partners] come back and they say ‘Oh, our sales leader says that they really want learning for this for their employees.’ And now you’re the go-between and you’re now all of the sudden just creating learning based on requests... You don’t want to put that in between you and the leaders of the business if you’re going to have a really strong learning organization and a company that really values learning.

When I talk to my peers in the industry, it feels like there's definitely ... they are thinking their organizational structure precludes them from actually realizing what they could or should do. I think that's why also it seems like there's a lot of turnover in the learning area ...

Alignment with HR was the one thing this participant requested I look into more as a researcher because her sense of churn amongst their learning and talent executive peers was so significant. Was it "politics?" Organizational design and structure? Perceptions about the importance of learning versus other, administrative HR functions? Resolving the empowerment of learning to unlock the potential of talent was clearly important to this participant.

Continuing the pattern of dysfunctional alignment, another participant said, "Of course, there's conflict. But it's more about capability... an organization needs to be flexible enough to be able to modify [roles and responsibilities] based on [capabilities]." The rest of this participant's response to the question chronicled the history of how their role expanded because they had the capability and the traditional HR function did not. This participant was determined succeed overcome alignment issues in their organization through hard work and demonstrating capability, even when the perception that certain work should go to HR instead of their department.

Though the alignment with HR was described as sub-optimal and inhibitory, there was also an element of necessity in the relationship. One participant said that they did not think that HR people knew how to do learning and should not be forming learning strategy. The opinion felt strong and the participant expressed great angst in describing the relationship they navigate with many Heads of Learning as clients. When observation as the researcher was provided about the emotion back to the participant, the participant said "Let me back track. I don't want to get in trouble by saying that." The participant

then softened their stance, starting with the importance of each role, the CHRO and CLO, then digging back into how unqualified most CHROs are at leading learning. The participants message to the CHRO, was “Stay focused on what you do and let the CLO and his or her team focus on what they do... but it would be understood that they work very, very closely together.”

Sub-optimal or inhibitory alignment with Human Resources appeared as a major challenge for seven of ten participants.

Collaborative. Since most of the participants had held multiple CLO/CTO roles in their career, they were also able to share stories of when the alignment with human resources was perceived as collaborative. This collaborative alignment was mentioned with equal frequency as the sub-optimal and inhibitory alignment. Seven participants shared their experiences and stories of positive relationships and clearly defined roles. Three of the seven participants attributed the collaborative alignment within Human Resources to the “leadership of the CHRO [Chief Human Resources Officer],” or “CPO [Chief People Officer.” Other participants were helping to foster the collaborative alignment amongst the functions. A participant shared:

One of my proudest achievements at [name removed] is to have helped the people functions to elevate the conversations to ask how can the three people functions [recruiting, talent management, and HR] be more aligned. The people leadership team is even a new title of my peers, and myself, that we invented about a year ago.

The participant described the collaborative alignment as “integrative talent management.” In their words:

There’s goodness in the sense that we believe integrative talent management will find efficiency for the business. It’ll reduce some of the gray area between some of our groups and provide role clarity for the people in our three functions, as well.

The participant went on to attribute what may have helped him and the other People function leaders achieve a collaborative alignment, and the participant share:

Interestingly, there's been a transition in leadership on the people function teams. We haven't had a history together that I think previous leaders of the people functions had. We're new and fresh to each other.

Reflecting on their collective attitude that supports the integrative talent management approach, the same participant described the attitude as, "Let's just do this thing together and let's put the employees at the center, rather than our needs."

Being able to put the experience common people they serve, seemed critical for the collaborative alignment to work. One participant said:

I'm a part of an organization called People and Culture, which is another word for HR. But the reasons we're called People and Culture is because we look at the people experience as an experience... And collectively, we see ourselves as collectively accountable for that entire experience. So we don't see ourselves as siloed. Although we have our responsibilities, our biggest responsibility is to each other to make sure that we understand what's happening in each of our respective areas.

Another said they "show up from a global perspective to our team members and the communities in which we live, work, and serve..." they [the leaders of People functions] think about it "systemically and organizationally" and about how to do that "through people." Seven of ten participants demonstrated productive, collaborative relationships and alignment with HR were possible and a reality.

Dismantled HR. Finally, the standout, progressive talent leader landed in their own category. Alignment with HR was a non-issue because the organization had intentionally dismantled the traditional functions of HR and split them up between the participant's scope of responsibility and the Chief Financial Officer's. Meaning, in the participant's current organization, there was no CHRO or Chief People Officer. The

participant owned all of Talent Management and the administrative functions of traditional HR, such as benefits administration, were housed under the CFO.

Let's step back and think of a traditional CHRO role. What do they own? They usually own learning, performance management, compensation, benefits, recruiting, and HR business partners and sometimes HR technologies. So a lot of components... If you think about which are the most strategic, in my mind, it's the learning and talent pieces but those often get buried under all those other things. What does the CEO care about most of all? What do the business leaders care about more? The care about their talent strategy and the learning strategy. How are we going to make sure people get the skills that they need and that they're learning what they want? Once you get the comp philosophy down and what the benefits are, that all seems like it should be just running. That's why the optimal org structure at [Company name removed] is what I would love to see at more companies. Where the Chief Learning and Talent officer reports to the CEO and then you have the CFO actually have all the other [components].

Adding to the story of the motivation behind this organizational design, the resident Silicon Valley participant shared the fact that, "Interestingly enough, at Google, the Chief People Officer there for the longest time was Laszlo Bock and he reported to the CFO." This participant was one of the seven who described historical conflict and inhibitory alignment, being blocked by a CHRO and HR business partners earlier in their career. The participant's demeanor felt light, energized, and delighted when sharing about the current organizational design and partnership with the CFO. Dismantling traditional HR functions meant HR alignment issues of the past were eliminated.

Summary

This chapter detailed the four groups of themes that emerged from the content analysis of the qualitative data collected from ten interviews. Themes of the first two groups reflected perceptions about the trajectory of the CLO/CTO role and opinions about the CLO title, which answered the research question, "How has the CLO role evolved and what is the perceived trajectory for the functions CLOs are performing

currently?” The third theme explored CLO/CTO approaches to driving learning strategy and answered the research question, “How are CLOs driving learning strategy?” The fourth theme addressed the alignment with Human Resources and answered the research question, “How are dynamics with other human resources leaders impacting the CLO role?” The final chapter will draw conclusions about the themes from the content analysis, hypothesize about the possible theoretical and practical implications of the findings from this study, outline the study limitations, and make recommendations about areas for further research on people who lead corporate talent functions.

Chapter 5: Discussion

This study sought to explore the future of the CLO role in the corporate organization through the perceptions of ten current and former Chief Learning Officers. This study addressed the following questions:

- How has the CLO role evolved and what is the perceived trajectory for functions CLOs are performing currently?
- How are CLOs driving learning strategy in organizations?
- How are dynamics with other human resources leaders impacting the CLO role?

This chapter concludes the research and provides a discussion of the results from ten semi-structured interviews. The discussion outlines the theoretical implications of the study and offer practical implications. Next, the discussion provides limitations, suggested areas of future research, and ends with a summary of conclusions.

Theoretical Implications

The results of this study build on the limited existing body of research available on CLOs. The results offer an expanded definition of the CLO/CTO role, confirmed a broader range of titles are used in practice to describe the people in these roles, and identified approaches to how CLO/CTOs are driving learning strategy. Based on the findings of this study, there are three theoretical implications.

Today's CLO/CTOs Are Operating Under An Expanded Role and Scope of Responsibilities. First, findings suggest an expanded role and scope of responsibilities of the CLO/CTO. It points to the existing literature on the role and scope of CLO responsibilities is likely outdated and incomplete. Nearly twenty years ago, Baldwin and Douglas (2000) produced the first research on Chief Learning Officers, addressing what

CLOs do in their corporate role. Willis and May (2000) provided one case study of a CLO's charter in a large home good business. Surgue and Lynch (2006) interviews of 90+ learning leaders concluded CLOs were running corporate universities, training, and change initiatives to improve employee performance. Haight (2017) examined what CLOs do to specifically build learning organizations. The results of this particular study indicated an expanded scope of responsibilities for the present-day CLO/CTO, beyond "just learning and training." The participants referred to their scope of responsibilities as "talent management" and a "talent life cycle." All participants discussed expanded responsibilities in their role and offered a variety of answers as to how they thought their role would continue to evolve in the future. This study calls for researchers to likewise, expand their definition of the CLO/CTO responsibilities and incorporate the study of talent management and its components including performance management, succession planning, leadership development, and career development when seeking to understand these leaders.

Next Wave of Learning Leaders Will Likely Be Found With 'Talent' Titles. The second theoretical implication based on findings is the CLO title in practice is changing or has already changed. Calling this role a CLO for research purposes may also be outdated and limiting. Like many of the participants from this study, Elkeles and colleagues (2017) call for a new title for the CLO, in their book, titled *The Chief Learning Officer: The Evolving Role of the Chief Learning Officer*. While there was a level of acceptance amongst the interview participants that different companies would attribute different titles to the same role, none of participants used the functional title of CLO in their organization. If the title of the CLO role has evolved in practice, researchers

ought to know what titles, or descriptions, to use in order to most accurately capture their desired audience or research participants. Suggested titles for researchers to use would be Chief Talent Officer, Head of Talent, Vice President of Talent, Talent Development, or Talent Management. Using the CLO title alone to describe these leaders is insufficient.

These Leaders Are Driving Learning Strategy Using Distinct Approaches. The third theoretical implication of the research findings is CLO/CTOs are driving learning strategy using distinct approaches. Brandi and Iannone's (2016) model of enterprise learning strategies outlines three components: competence development, work design and the organization of work, and learning systems and incentives. Additionally, their 2017 work focused on three influential aspects of how learning strategy drives competence development: the highest value employee skills, main triggers for learning and investment in learning, as well as the most successful types of learning. Building on Brandi and Iannone's (2016, 2017) work, the results of this study identified the CLO/CTO is driving the learning strategy, their different approaches, and who else is involved in the process based on the approach. The possibility exists to conduct research on understanding how CLO/CTOs are creating or executing specific components of Brandi and Iannone's (2016, 2017) enterprise learning strategy models and also to evaluate the effectiveness of different approaches to driving an enterprise learning strategy.

This study confirmed existing literature, builds on what is known about CLO/CTOs, and addressed a gap in the research. Results of this study also generated practical implications for further dialogue about CLO/CTOs and their ability to impact organizational performance through talent interventions.

Practical Implications

CLO/CTOs Face The Same Challenges As The People They Support.

It is too soon to tell what the long-term impact will be of investing in the CLO positions to address the challenges posed by a rapidly changing business environment. Some other organizational structures may ultimately emerge that more effectively integrate learning in a company. However, there can be no doubt from our interviews [with 10 America CEOs] that the challenges confronted by the CLOs will be central to organizational success in years to come. (Baldwin & Danielson, 2000, p. 14)

As discussed by participants, CLO/CTOs need support developing the skills and competencies that enable them to be most effective in their roles, so they may in turn, lead organizations to develop skilled and competent workforces. CLO/CTOs are being challenged by the same technological advancements and global disruptions as the employees in their organizations. Their roles require greater business acumen as they take on more responsibilities in talent management. Also, innovation and technology demand CLO/CTOs provide evermore elegant, user-friendly learning experiences that leverage neuroscience to deliver engaging learning solutions. Support for CLO/CTOs may mean additional academic partnerships, programs for on-going education, or professional networks. Currently, the options dedicated to CLOs are limited. Two notable academic programs are the Executive CLO Doctoral program at University of Pennsylvania or the International Institute of Management Development Organizational Learning in Action (OLA) program in Switzerland. Opportunities also exist for communities of practice, such as the CLO Symposium, *Chief Learning Officer Magazine*, the Association of Talent Development, and i4CP, to provide education, possible credentialing, research, and networking for these leaders. Organizational development professionals may consider establishing trans-organizational, collaborative efforts with learning leaders from corporations, academic institutions, and the government to address the effects of

specific technologies, such as machine learning and artificial intelligence, on the workforce. In summary, CLO/CTOs will need to find ways to navigate their own relevancy and skills development in parallel to continue developing the workforce they support.

Ask How Your Organizational Design Supports Your People & Talent Strategy.

The findings of the study suggest the CLO/CTO's alignment with human resources appears to have a significant impact on the perceived effectiveness of CLO/CTOs to fulfill their roles as learning and talent management leaders. One possible solution is for the board, executive management, and the leaders of Learning, Talent, or Human Resources functions to examine how the organizational design supports the goals and the overall talent strategy of the organization. This assessment may include an evaluation of the organizational design and structure for the people functions, their roles and responsibilities, and constructing a philosophy that can be communicated to all employees on how these functions contribute to the employee life cycle. In service of the employee and customer experience, it may be useful to surface and directly address any turf wars, role redundancies, or conflictual relationships in people functions which are an unintentional result of legacy structures or poor design. For learning and talent leaders to realize their full potential in driving performance in the organization, it may be well worth asking the questions of how the organizational design supports the strategy, with particular attention to overlap in talent functions.

Limitations

There are three main limitations to the study. First, the interviews were limited to 60 minutes. In many of the interviews, the researcher had to refrain from asking additional,

exploratory, or clarifying questions that could have added richness of the data, in order to complete the interview protocol in the designated time. Several of the participants voluntarily exceeded the allotted 60 minutes. However, the researcher was mindful of the 60-minute commitment. Unaware when a participant had additional time available, the researcher restrained her own curiosity. Second, the inclusion criteria required the participant identify as a current or former Chief Learning Officer. In the initial recruiting process, the search was limited to contacts with CLO titles on their LinkedIn profiles and the researcher did not seek Chief Talent, Chief Talent Development, or Chief People Officers. Third, there were occasional technology challenges during recording. In two interviews, the device stopped recording momentarily, resulting in losing data for those brief incidences. Also, the audio quality was muffled at times, which made accurate transcription difficult.

Areas for Future Study

The results of this study, combined with the existing literature available, provide clues about areas for future study. As discussed in the theoretical implications, eight of ten participants spoke about technology continuing to shape their future, their role, and the future of the workforce they served. In her review of organizational learning literature, Argote (2011) called for additional research on the impact of technology on knowledge management: knowledge creation, knowledge retention, and knowledge transfer. Argote also called for further investigation of what successful knowledge management means for globally dispersed teams and new working arrangements, such as the gig economy, given the influence of technology. *Chief Learning Officer* magazine and the *Association of Talent Development* are two prominent practitioner resources

attempting to address the dialogue about learning, talent development, technology, the changing workforce, and what CLO/CTOs can do to both support and navigate these challenges. Academic research and further study could facilitate an informed practitioner dialogue. Many opportunities exist for the future study of the intersection of CLO/CTOs and technology, and what it means for modern learning and the modern workforce. In the face of rapid change and innovation, it is possible the talent field will need to start thinking about knowledge management in terms of the life-span of a skill. A comprehensive study quantifying the life-span of different types of skills could help talent leaders improve the effectiveness of knowledge management in the organization through prioritization and planning.

Extending the impact of technology, innovation, and world disruption to the talent pipeline, there is another possibility around the area of future study concerning the trans-organizational partnerships CLO/CTOs foster as part of their learning strategy. The work of Capelli (2015, 2014) examined the phenomena of the skills gap, or the mismatch between the available skills in the talent pool and what skills are actually needed by organizations. One participant spoke about their work partnering with communities, non-profits, and academic institutions to address the skills gap in their talent pipeline and prepare their future workforce. Their notion of corporate university went well beyond the walls of their business and involved many partnerships. Given the pace of change, corporations face the possible challenge of owning more of the burden in addressing the skills gap than traditional academic institutions. Trans-organizational partnerships could be a critical element of corporate learning strategy and a wealth of opportunity for future study.

Conclusion

There are many opportunities for the future of the Chief Talent Officer. Four key themes emerged from this study: 1) a perceived trajectory of the CLO role, 2) opinions about the CLO title, 3) specific approaches to driving learning strategy, and 4) characterizations of the alignment with human resources. Participants in this study spoke about their future with general optimism and deep commitment to their personal missions of helping people develop the skills they need to excel in their work. In a 2014 survey of 1,344 CEOs, 93% of them said they “recognize the need to change their strategy for attracting and retaining talent,” and only 34% of CEOs felt that their HR functions are “well-prepared to capitalize on transformational trends,” (PwC, 2014). Heads of corporate learning and talent are posed for massive impact, important partnerships, and their own transformation.

References

- Argyris, C. & Schon, D. A. (1978). *Organizational Learning: A Theory of Action Perspective*. Reading, MA. Addison-Wesley Publishing Company, Inc.
- Argote, L. (2011). Organizational learning research: Past, present and future. *Management Learning*, 42(4), 439–446. <https://doi.org/10.1177/1350507611408217>
- Association for Talent Development. (2018). Retrieved March 20, 2018, from www.td.org
- ASTD. (2014). *Building an Innovative Organization: The Role of Training and Development*.
- Awazu, Y., & Desouza, K. (2004). The Knowledge Chiefs: CKOs, CLOs and CPOs. *European Management Journal*, 22(3), 339–344. <https://doi.org/10.1016/j.emj.2004.04.009>
- Baldwin, T. T., & Danielson, C. C. (2000). Building a Learning Strategy at the Top: Interviews with Ten of America's CLOs. *Business Horizons*, (November-December), 5–14.
- Benko, C., Gorman, T., & Steinberg, A. R. (2014). Disrupting the CHRO Following in the CFO's Footsteps. *Deloitte Review*, (49), 47–63.
- Brandi, U., & Iannone, R. L. (2016). Learning Strategies in Enterprises: Empirical findings, implications and perspectives for the immediate future. *European Journal of Education*, 51(2), 227–243. <https://doi.org/10.1111/ejed.12178>
- Brandi, U., & Iannone, R. L. (2017). Learning strategies for competence development in enterprises. *Industrial and Commercial Training*, 49(1), 1–5. <https://doi.org/10.1108/ICT-08-2016-0052>
- Cappelli, P. H. (2015). Skills Gaps, Skills Shortages, and Skill Mismatches : Evidence and Arguments for the. *ILR Review*, 68(2), 251–290. <https://doi.org/10.1177/0019793914564961>.
- Cappelli, P., & Keller, J. (2014). Talent Management: Conceptual Approaches and Practical Challenges. *Annual Review of Organizational Psychology and Organizational Behavior*, 1(1), 305–331. <https://doi.org/10.1146/annurev-orgpsych-031413-091314>
- Caudron, S. (2003, February). CLO Accountability. *Talent Development*, 37–35.
- Chakravarthy, B. S. (1982). Adaptation: A Promising Metaphor for Strategic Management. *Academy of Management Review*, 7(1), 35–44. Retrieved from <http://web.a.ebscohost.com.lib.pepperdine.edu/ehost/pdfviewer/pdfviewer?vid=5&si>

d=d154fd38-1490-4a74-b313-6e527f4806dc%40sessionmgr4006

- Chen, J. (2015). The Emerging Role of HR in the Boardroom. *People + Strategy*, 38(2), 36–43.
- Dearborn, J. (2015, June). Why Your Company Needs Learning Culture. *Chief Learning Officer*.
- Douglas, R. C. (2014). The Chief Learning Officer: Pursuing a Grounded Theory of Executive Leadership At the Top of the Human Resource Development Field, 169.
- Easterby-Smith, M., Crossan, M. M., & Nicolini, D. (2000). Organizational Learning: Debates past, present and future. *Journal of Management Studies*, 37(6), 783–796. <https://doi.org/10.1111/1467-6486.00203>
- Easterby-Smith, M., Lyles, M. A., & Tsang, E. W. K. (2008). Inter-organizational knowledge transfer: Current themes and future prospects. *Journal of Management Studies*, 45(4), 677–690. <https://doi.org/10.1111/j.1467-6486.2008.00773.x>
- Easterby-Smith, M., & Prieto, I. M. (2008). Dynamic Capabilities and Knowledge Management: An Integrative Role for Learning? *British Journal of Management*, 19(3), 235–249. <https://doi.org/10.1111/j.1467-8551.2007.00543.x>
- Elkeles, T., & Phillips, J. (2007). *The Chief Learning Officer: Driving Value Within a Changing Organization Through Learning and Development* (1st ed.). Burlington: Elsevier Inc.
- Elkeles, T., Phillips, J. J., & Phillips, P. P. (2017). *Chief Talent Officer: The Evolving Role of the Chief Learning Officer* (2nd ed.). New York: Routledge.
- Fayad, A. (2015). What Does a Chief Learning Officer Do? Retrieved April 24, 2017, from <http://elearningmind.com/chief-learning-officer/>
- Fiol, C. M., & Lyles, M. (1985). Organizational Learning. *Academy of Management Review*, 10(4), 803–813. Retrieved from <http://web.a.ebscohost.com.lib.pepperdine.edu/ehost/pdfviewer/pdfviewer?vid=7&sid=e9d86ba8-b1e4-46a4-8f41-acc92127ad47%40sessionmgr4008>
- Gallup. (2017). *State of the American Workplace*. Gallup.
- Garvin, D. A. (1993). Building a Learning Organization. Retrieved July 21, 2017, from <https://hbr.org/1993/07/building-a-learning-organization>
- Gehl, R. W. (2014). Power from the C-Suite: The Chief Knowledge Officer and Chief Learning Officer as Agents of Noopower. *Communication and Critical/Cultural Studies*, 11(July), 175–194. <https://doi.org/10.1080/14791420.2014.905694>

- Goldsmith, K. (2009). *The Relationship Between Learning Executive Leadership Styles and Participation in Strategic Learning Decisions*. University of Phoenix.
- Greco, J. (1999). What is a CKO - And Should You Have One? *Journal of Business Strategy*, 20(2), 20–20.
- Haight, V. D. (2017). *What Do Chief Learning Officers Do ? An Exploratory Study of How Chief Learning Officers Build Learning Organizations*. George Washington University.
- Hassell, B. (2017). The Learning Side of Sears. *Chief Learning Officer*, (March), 26–30.
- Hodgetts, R. M. (1996). A Conversation with Steve Kerr. *Organizational Dynamics*, 24(4), 68–79. [https://doi.org/http://dx.doi.org/10.1016/S0090-2616\(96\)90014-5](https://doi.org/http://dx.doi.org/10.1016/S0090-2616(96)90014-5)
- Huber, G. (1998). Synergies Between Organizational Learning and Creativity & Innovation. *Creativity and Innovation Management*, 7(1), 3–8. <https://doi.org/10.1111/1467-8691.00079>
- Johnson, D. (2017). *Modern Learning*. San Francisco.
- Kim, K., Watkins, K. E., & Lu, Z. (Laura). (2017). The Impact of a Learning Organization on Performance. *European Journal of Training and Development*, 41(2), 177–193. <https://doi.org/10.1108/EJTD-01-2016-0003>
- Kimble, C., & Bourdon, I. (2008). Some success factors for the communal management of knowledge. *International Journal of Information Management*, 28(6), 461–467. <https://doi.org/10.1016/j.ijinfomgt.2008.08.007>
- Lackey, R. M. (2000). *The Role of The Chief Learning Officer: Implications for Theory and Practice*. The University of New Mexico. <https://doi.org/10.16953/deusbed.74839>
- Lee, S., Rittiner, F., & Szulanski, G. (2016). The Past, Present, and Future of Organizational Learning Research. *Journal of Management Inquiry*, 25(1), 85–92. <https://doi.org/10.1177/1056492615576974>
- Morgan, G. (1997). *Images of Organization*. Thousand Oaks: Sage Publications.
- Northouse, P. G. (2013). *Leadership: Theory and Practice*. Los Angeles: Sage Publications.
- Petrie, N. (2011). Future Trends in Leadership Development. *Center for Creative Leadership (CCL)*, 1–36.

- Prafka, D. W. (2009). *Leadership as Exhibited by a Private Sector Learning Executive: A Descriptive Case Study of Leadership*. North Carolina State University.
- PwC. (2014). *17th Annual Global CEO Survey: Transforming talent strategy*.
- Raub, S., & von Wittich, D. (2004). Implementing Knowledge Management: Three Strategies for Effective CKOs. *European Management Journal*, 22(6), 714–724. <https://doi.org/10.1016/j.emj.2004.09.024>
- Rossett, A. (2009, April). Strategy for Learning Leaders. *Chief Learning Officer*, 42–49.
- Senge, P. M. (1990). *The Fifth Discipline: The Art & Practice of the Learning Organization* (Revised). New York: Crown Business.
- Short, D. C. (2012). Better Know an HRD Scholar: A Conversation with Verna Willis. *Human Resource Development International*, 15(5), 635–642. <https://doi.org/10.1080/13678868.2012.726541>
- Slocum Jr., J. W., McGill, M., & Lei, D. T. (1994). The New Learning Strategy: Anytime, anything, anywhere. *Organizational Dynamics*, 23(2), 33–47. [https://doi.org/10.1016/0090-2616\(94\)90067-1](https://doi.org/10.1016/0090-2616(94)90067-1)
- Spreitzer, G. M., & Vance, C. M. (2002). Steve Kerr and His Years with Jack Welch at GE. *Journal of Management Inquiry*, 11(4), 341–342. <https://doi.org/10.1177/1056492602238839>
- Surgue, B., & Lynch, D. (2006). Profiling a New Breed of Learning Executive. *T+D*, (February), 51–57.
- Thomson, L., Pate, D., Schnidman, A., Lu, L., Andreatta, B., & Dewett, T. (2017). Workplace Learning Report: how modern L&D pros are tackling top challenges, 41.
- Today's World-Class Chief Learning Officer. (2012). Retrieved March 27, 2017, from <http://blog.berin.com/todays-world-class-chief-learning-officer/?id=de0e7229-d688-4746-8736-5817482885c8>
- Velencei, J., Szoboszlai, V., & Baracscai, Z. (2014). Smart Decisions: Doctus Chooses a CLO. *Managerial Challenges of the Contemporary Society*, 7(2), 152–157.
- Willis, V. J. (1991). The New Learning Organization: Should There Be a Chief Learning Officer in the House? *Human Resource Development Quarterly*, 2(2), 181–187.
- Willis, V. J., & May, G. L. (2000). Strategy and the Chief Learning Officer. *In Action: Leading Knowledge Management and Learning*, 55–70.