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# EARLY OFF THE MARK

## *RBC Financial Group's E-Learning Track Record*

BY DEBBIE MURRAY

*October 2001*

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In April 2001, The Conference Board of Canada, with funding from Human Resources Development Canada's Office of Learning Technologies, launched the Learning Technologies in the Workplace Awards. RBC Financial Group was one of the three national winners. This case study illustrates the outstanding and innovative efforts that make RBC a winner.

### **Acknowledgements**

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This case study is based on a site visit and interviews with the aforementioned Personal Learning Network staff, documentation supplied by the PLN and the PLN's award-winning submission.



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# EARLY OFF THE MARK: RBC FINANCIAL GROUP'S E-LEARNING TRACK RECORD

## Introduction

RBC Financial Group is Canada's largest financial services enterprise, with assets of \$289 billion and 58,000 employees in North America and 30 countries around the world, serving 12 million clients.

RBC Financial Group is remarkable for its foresight and early efforts in an area that still, five years later, is new to many. The keys to RBC Financial Group's innovation and award-winning delivery of e-learning have been its early vision, track record, broad distribution, measurement of results, strong executive and financial support, and desire to be a learning organization.

## Genesis of E-Learning Innovation

The size of RBC Financial Group is a key factor in defining the challenges the company faces. Specifically, these challenges are:

- a large customer population;
- constantly changing products and services;
- geographical dispersion;
- a large number of employees;
- sensitive customer transactions;
- shareholder expectations; and of course
- a desire to be competitive.

Conference Board research found that a top barrier to learning among employees was finding the time to learn in a fast-paced, information-rich environment, a challenge RBC Financial Group also faced. E-learning provided a solution to many of these challenges.

RBC Financial Group's human resource strategy has identified a shift from classroom-based learning to workplace learning, self-directed learning, learning activities mapped to generic competencies, and timely and effective

coaching. However, RBC Financial Group's self-directed learning and blended learning use both e-learning and classroom delivery.

At the core of RBC Financial Group's success is its commitment to continuous learning and to creating a learning organization:

*"to ensure that all employees provide outstanding levels of customer service and learn the skills necessary to adapt to changes in the financial services industry and maximize the opportunity for employee growth and organization renewal."<sup>1</sup>*

RBC Financial Group's Royal Learning Network is responsible for all employee workplace learning, regardless of delivery method. One component of the Royal Learning Network is the Personal Learning Network (PLN), RBC Financial Group's effort at meeting the above goals through the use of e-learning. The PLN is a competency-based, learning management system (LMS). It manages learning paths, collects data and delivers learning content to employees through a supporting team of developers, learning specialists and managers. Operating on a cost-recovery model, the PLN markets to internal clients and responds to internal requests for proposals for technology-assisted learning from business units, functional units and geographical units. The PLN also has a budget to encourage technology-assisted learning by lower organizational levels that don't have the funds for developing e-learning. The PLN determines delivery method by considering size of audience, speed of implementation and cost. Its staff will even recommend against a technology-assisted solution if

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<sup>1</sup> Documentation about the Royal Learning Network supplied by

RBC Financial Group.

By November 2000, RBC Financial Group had achieved its Workplace 2000 vision of employee learning anytime, anywhere with 42,000 employees nationwide participating in e-learning via the Internet and LEOnet. ►

Learning content and delivery was also developed in-house because their vision of a learning delivery and tracking tool was ahead of the market in 1995 and because of its proprietary content. ►

Special needs are considered, such as using minimal audio for the hearing impaired. ►

they don't think that this is the best way to fulfil the learner and business needs.

The PLN started in 1995, when Jim Gannon and a small team of learning and development specialists decided they wanted a learning management system to deliver and track learning. This team—which was also in the process of rolling out RBC Financial Group's new competency-based development and performance management system—recognized that learning technologies might be a way to deliver learning to a dispersed employee base. As well, technologies such as the Internet and the World Wide Web were becoming part of popular and business culture. This corporate vision, called Workplace 2000, included home and desktop accessibility by the year 2000, and meant employee learning would be readily available at their fingertips, anytime, anywhere through self-directed, computer-based delivery methods. Since there was nothing available to fulfil their need in 1995, the PLN team set out to develop an LMS.

The LMS was launched to 50 pilot sites in 1995. Each site had a multimedia PC that was updated once a week through a host PC. By 1997, there were 379 sites with 18,000 staff learners on a modem-based system. Use and demand grew. When the PLN was placed on its own exclusive intranet platform in 1998 it was reaching 1100 units and 40,000 staff. In that same year, the PLN won a 1998 Excellence in Practice award from the American Society for Training and Development (ASTD). By November 2000, RBC Financial Group had achieved its Workplace 2000 vision of employee learning anytime, anywhere with 42,000 employees nationwide participating in e-learning via the Internet and LEOnet (RBC Financial Group's corporate intranet). Twenty web-based activities are currently delivered

through the PLN. The content ranges from Negotiations & Fraud to a Royal Mutual Funds Investment Curriculum.

RBC Financial Group's e-learning model is the PLN, the learning management system that was developed and built by RBC Financial Group and the courses delivered through the LMS. Learning content and delivery was also developed in-house. The in-house development was necessary because their vision of a learning delivery and tracking tool was ahead of the market in 1995 (not much off-the-shelf software and content existed that could meet their needs) and because of its proprietary content, a situation that continues today. The result is a system that is cutting edge in terms of design and structure.

External vendors supply some non-proprietary content, such as Microsoft products training. Agreements with service providers are evaluated, and the PLN expects vendors to be proactive and anticipate and respond to their needs. Lori Mistry, Manager, Technology Assisted Learning, says, "If we can get generic, off-the-shelf content that is applicable to our need, it enables us to get it out to our audience faster." For the PLN, software development is not a business line. Content and delivery are developed only when they can't be purchased externally.

When content is developed in-house, subject matter experts are included on the project team. The PLN also uses consistent design standards (such as consistent exit buttons, navigation buttons and structure) and a modular design that delivers learning in 10-15 minute chunks. Learning can also be bookmarked so learners can identify their learning and return to it at their convenience. Special needs are also considered, such as using minimal audio for the hearing impaired.

*Lack of French content is still a major barrier to e-learning use for most Canadian employers. But RBC Financial Group has dealt with lack of French content by developing its own, or working with external vendors to develop it.*



Conference Board of Canada research indicates that lack of French content is still a major barrier to e-learning use for most Canadian employers. But RBC Financial Group has dealt with lack of French content by developing its own, or working with external vendors to develop it. By 1998, 90 per cent of all course material was available in French. With a centralized system for updating software and content, learning content is continuously refreshed and aligned with business needs.

The PLN group has found that costs have dropped over the last few years, with Web delivery and development now cheaper than multimedia. The PLN uses Web-based technologies and does not allow public access. Protected by a firewall and encryption, the PLN is a medium-risk delivery system, according to Shayne Yestal, Manager, Personal Learning Network. The PLN has an on-line privacy policy to protect and define users and the information in the system. A fibre-optic network delivers the PLN to users in the Toronto core area. The PLN is delivered by TI to branches, which are now being rewired with fibre-optic cable. The PLN is delivered to remote users by VSAT (very small aperture terminal).

Access by employees depends on their location and job. Customer service representatives working in the branches use kiosks to access the PLN on the job. Most other employees can access the PLN through their desktop. All employees can arrange for access from home if they have their own computer. Employees log on through the PLN homepage and their learning is tracked through an employee ID and password. Learner support is provided in two ways: telephone and e-mail. First, a phone number is provided for learner support. Four PLN analysts handle 3–4,000 calls a month from across Canada.

*Four PLN analysts handle 3–4,000 calls a month from across Canada.*



*Constant involvement of learner feedback into the design of the PLN is a key to its success.*



The goal of all first-level support calls is to ensure a high level of service by handling them within 60 seconds. Through asynchronous (one-way) on-line facilitation, learners can e-mail an instructor or content expert for feedback and help.

With innovation and success came growing pains. Yestal noted that when he started in November 1996, there was a prototype, but it wouldn't scale out to a broader audience. Achieving a scalable LMS took three years and required converting the 20,000 established users to the new system as well as getting new users on board. The new system, with a new back end, was based on Oracle and Netscape, two reliable standard technologies. The LMS staff developed their own standards and have now integrated these with the industry-wide AICC standard. As well, they are also building a rules engine for the PLN to handle licensing requirements for content. The goal is to allow managers to search employees by desired competencies, thereby linking internal recruiting with learning maps and goals of employees. Every year the PLN development team reviews the LMS market to determine how the PLN compares. So far, Yestal points out, the PLN maintains a cutting-edge position, in part thanks to the economic distribution and content dissemination capacities of the Web. In fact, he thinks RBC Financial Group could market it externally.

Constant involvement of learner feedback into the design of the PLN is a key to its success. Initially, employee feedback was collected from a cross-section of staff to help determine requirements for a computer-based learning system. Throughout the development of the PLN, focus groups met via conference call on a monthly basis. These focus groups, composed of a cross-section of geographical and organizational levels, were involved in testing and

▶ *Learners developing their path start by comparing their current profile with other job profiles to determine what they need to advance to these jobs. A learning map is then created with the appropriate learning agreed upon by manager and employee, and the delivery method determined by the employee.*

▶ *Many areas of RBC Financial Group also supply personal learning days to encourage learning, one of the ways it supports formal time to learn.*

▶ *RBC Financial Group uses hits, not duration, as an indication of usage. Staff note that time spent may not be relevant as everyone learns in a different manner.*

provided input into PLN design and implementation. Today, automatic electronic surveys provide ongoing learner feedback on many issues, including content evaluation. These data are used to improve current content and delivery and for new design and implementation.

### **Tracking, Measurement, Performance Management and Communications**

One of the strengths of RBC Financial Group's efforts has been its tracking and measurement, performance management and communications of e-learning delivery.

Specific tracking tools include learning maps to help employees plan their own training and development in relation to current jobs as well as their long-term plans. Manager reports containing PLN data facilitate coaching and development discussion with their direct reports.

Learners also benefit from online testing and certification.

Learners developing their path start by comparing their current profile with other job profiles to determine what they need to advance to these jobs. A learning map is then created with the appropriate learning agreed upon by manager and employee, and the delivery method determined by the employee. The learning history of each employee is retained through his or her career at RBC Financial Group and is used by managers and employees to guide learning and professional development. Many areas of RBC Financial Group also supply personal learning days to encourage learning, one of the ways it supports formal time to learn.

Participation in all forms of learning is tracked and reported to the employee's manager. Scoring is reported as complete/incomplete to the manager while the employee receives the actual score.

Employees can view their scores and learning maps through the PLN.

A data connection with the organization's human resources information system (HRIS) provides a single, reliable source of key HR information. Mary Watson, Co-ordinator, Personal Learning Network, is responsible for support, data integrity and reporting of data between the HRIS and the PLN as well as liaising with human resources. Data from the HRIS are imported bi-weekly to the PLN, including employee numbers, roles, competencies and related activities.

The data collected by the PLN can be broken down by:

- time period;
- business unit, functional unit, geographical unit;
- number of active users;
- number of active users who have completed the course;
- average hours in course per learner for job;
- number of active users who have taken the test; and
- number of active users who have passed the test.

As well, the following reports are available to learners and managers on the PLN:

- course usage by job type;
- course usage by region;
- course usage by transit (a transit is a numeric designation for a unit);
- national summary report;
- national usage trend chart; and
- regional usage trend chart.

RBC Financial Group uses hits, not duration, as an indication of usage. Staff note that time spent may not be relevant as everyone learns in a different manner. This becomes even more important when one considers that learners are given options to learn in the manner that suits them.

The data collected are also used to ensure accountability of managers and

*The keys to RBC Financial Group's success have been:*

- *a strong executive and resource commitment to e-learning;*
- *an innovative approach to learning and early identification of e-learning as a method for delivering professional development and training; and*
- *an organizational culture of learning that is strongly reinforced and expected through performance management processes.*

employees to their learning plans, and are used by business units and executives to track performance and for general determination of value.

Getting the word out about the PLN relies on the performance management process, a newsletter and a presence on LEOnet (the corporate intranet). Business units are responsible for pushing information down to learners. Sales effectiveness managers also address learning during their weekly calls to managers in field. Finally, professional development plans are mandated for employees, and the PLN is one means of allowing employees to fulfil these plans. As well, there are PLN priority courses that employees must take with a date for completion set in the system. Karen Lasinskas, Program Manager, PLN, is responsible for communicating and marketing the PLN to clients and external stakeholders. She also manages all aspects of the day-to-day operation of the system.

### **Lessons Learned**

In the spirit of continuous improvement, RBC Financial Group notes some of the lessons it has learned through the process of building the PLN. These include:

- critical need to nurture business relationships;
- effective marketing—targeted communication strategy;
- service provider agreements—regular review and reporting;
- regular vendor 'relationship' meetings;
- effective training and communication for first- and second-level support calls;
- making learning fun;
- employee satisfaction indicates success;
- critical need for focus group participants—eyes and ears of learners;
- making time for learning is still the biggest challenge;

- usage targets may be dangerous because they don't reveal learning experience; and
- extra attention required for users with minimal PC skills.

### **Keys to Success**

The keys to RBC Financial Group's success have been:

- a strong executive and resource commitment to e-learning;
- an innovative approach to learning and early identification of e-learning as a method for delivering professional development and training; and
- an organizational culture of learning that is strongly reinforced and expected through performance management processes.

### **Benefits**

RBC Financial Group notes the following benefits of its e-learning model:

- broad, flexible access;
- planned learning process;
- linkage to performance plan, corporate objectives and personal career path;
- range of content;
- consistency of interventions;
- just-in-time training;
- improved employee performance—employee survey results showed employees using the PLN rated high in the following dimensions:
  - better trained to do job;
  - clear understanding of their job requirements;
  - better access to information to meet customers' need; and
  - improved branch performance in terms of customer satisfaction.

The PLN team also notes that levels of individual and organizational learning are associated with positive business outcomes. Growing business results continue to exceed established targets

*Technology is part of their everyday work process, so using technology to learn is an extension of their use of technology to work.*



and employee opinion surveys indicate considerable improvement in learning capability.

### **Conclusion**

Employees of the RBC Financial Group are literate, educated and motivated to provide business excellence through learning excellence. Technology is part of their everyday work process, so

using technology to learn is an extension of their use of technology to work. Karen Lasinkas notes that while employees were “shy at first, they are now embracing the PLN.” Employees and management at RBC Financial Group have been quick to accept the technology and are among the first in Canada to realize, appreciate and maintain commitment to the value of e-learning innovation.



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