Pushing the boundaries of Learning innovation at PwC

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PwC is a network of nearly 170,000 employees in 80 member firms across 158 countries and territories. They focus on audit, assurance, tax and advisory services. Some say, only partly in jest, that they ‘stomp out risk for a living.’ Yet as an organisation, they continue to push the boundaries of learning innovation, and their approach illustrates why they act as a benchmark for us all.

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Pushing the boundaries of collaboration

Their first win was for the best use of social media. The PwC Learning Technology and Transformation team (LT&T) was asked to partner with Knowledge Management and global IT to prepare for the launch of Spark, PwC’s social media and collaboration platform. It was viewed by some as a potentially risky new way of working. The team were not only tasked to support the adoption and training needs for a global rollout they were also asked to make ‘social media for learning’ experts out of their (often equally sceptical) learning and development professionals across the globe.

Encouraging collaboration between users

LT&T approached the first task with the firm belief that if extensive training was needed for the average end-user to be able to use the platform, then they’d chosen the wrong tool. For this audience, they adopted a ‘no training’ strategy that relied on community and support.

Developed by Towards Maturity. See www.towardsmaturity.org/index/employer-stories/ for more case studies and resources.
A Help & Support community was created for end-users in Spark itself. This was seeded with a core set of quick reference cards and bite sized ‘YouTube-like’ help videos of basic functionality. This group quickly became the largest and most active community on Spark.

To help support adoption and create ‘buzz,’ they used Skype, WebEx and mobile phone cameras to capture casual videos of employees across the world talking about Spark. These were edited into a ‘Spark-in-a-Minute’ video promoting the new platform. The approach worked and Spark is on track with the usage and adoption metrics established by the Knowledge Management implementation team:

- Over 106,000 individual users logged in during a typical 90-day period
- Someone logs into Spark every 16 seconds
- The initial ten core video and text resources posted in the Help & Support group have received over 65,000 views

In fact, the Help & Support group has been one of the most active groups on Spark!

Building social into the blend

Based on previous experience, the LT&T team knew they had very little tolerance for failure with new technologies for learning. Given the profile of the social media platform, L&D were potentially under pressure from some parts of the organisation to include it in all aspects of their blended learning solutions. Other parts of the organisation considered that ‘unofficial’ information on Sparks would just be too risky.

The team decided to create the PARTS model, a guide to help L&D professionals make prudent decisions about when to use social media as part of a learning solution. The PARTS model includes a focus on:

- **People** – who are the learners and how can Spark [social media] help?
- **Aims/Objectives** – what are the learning and performance issues that we are trying to solve?
- **Roles** – what are the roles you’ll need to help your group succeed?
- **Tools** – what social media tools will you use?
- **Strategy** – how will you implement your group and measure success?

They also created quick reference cards and checklists to support L&D professionals in the application of the model. For example, mapping Bloom’s Taxonomy and the 70:20:10 model to social media techniques to show practical examples of L&D professionals might attain various learning and performance support objectives through social media.

To share ideas on the PARTS, the model and supporting materials were posted to an informal learning group in Spark called ‘Social Media for Learning,’ so people could ask questions of one another and share how they were thinking of using social media to support both formal
and informal learning needs. Over 100 professionals from all over the firm (not just L&D) joined this community.

*Figure 1A high-level overview of the PARTS model*

The LT&T team collaborated with members of this group to create a series of resources that included guidelines for facilitating online discussions (and for participants involved in those discussions), tips for creating successful online activities, for teaching online in Sparks, for moderators and for writing great online discussion questions. Examples of good activities to use in social learning groups were shared alongside case studies of how the PARTS model is used to design a social learning experience.

Lastly, in conjunction with the social media elements, the team hosted social media for learning skills series that included virtual workshops to help design learning activities, webinars with external experts in this emerging field.

Always encouraging L&D to practice what they preached, participants were invited to a ‘sandbox’ community and asked to build out a prototype of groups/activities for learning using guidance from the Help & Support community. During the virtual classroom sessions, they covered more advanced functionality and let learners share what they’d done as part of their pre-work and ask questions. After the live session, further development could be done in the sandbox, where coaches monitored progress and answered questions.

Once again, their approach paid off. The social media for learning skills series was the most popular series offered in 2013, attended by 364 L&D professionals. Attendance even surpassed that of the global rollout of a new virtual classroom tool. During 2013, three of PwC’s blended learning designs for Sales training, blended learning and leadership, which all incorporated social media for learning, won gold L&D awards.
Pushing the boundaries of learning design

PwC’s commitment to driving innovative blended learning also came through in their 2\textsuperscript{nd} Gold eLearning Award for excellence in content production. Extensive analysis of clients responses outlined how much they appreciated being able to build relationships with PwC people, relationships that go beyond the life of the project work commissioned. However, deeper analysis within the firm showed the need to communicate more clearly, use more practical words instead of jargon, be practical and relevant and avoid open-ended and abstract concepts. Staff also needed to get to the point quicker and make all of their words count.

This resulted in a significant global change management process that involved a shift in the way staff interact with clients, how they speak, how they write and how they represent the PwC brand.

The overall learning strategy associated with this initiative included five modules using a variety of modalities including self paced eLearning, virtual classroom sessions, game-based activities, business simulation and creative use of multimedia that took people through:

- **Module 1** - How to use templates and the PowerPoint toolbox to create branded documents (via elearning or virtual classroom)
- **Module 2** - Our brand, Our Clients and You (an introduction to the brand delivered by simulation based elearning)
- **Module 3** – Writing in the brand style (using video and game based activities
- **Module 4** – Words that win work ( virtual classrooms on how to use the brand’s verbal and visual identity in proposals)
- **Module 5** – Writing reports that people want to read (via virtual classroom).
Intrigue and sleuthing!

The third module – ‘Writing in the Brand Style’ was one of the most creative and atypical eLearning production executed by PwC for their global community of learners. Why? Because of ‘Fach Trottel’!

Fach Trottel is a mysterious character (or operation) within the learning programme that has been widely corrupting the Firm’s written communications around the world. Fach Trottel has had such an impact on corrupting proposals and client facing communications that the organisations within the programme experienced a tremendous loss of business and revenue. The words ‘Fach Trottel’ have appeared on corrupted works and files around the world. Despite multiple failed efforts to uncover this breech, the highest levels of leadership have hired a detective to investigate and solve this breach. Along with the Detective Holden, the learners are encouraged to travel around the world to investigate global outbreaks, interview staff, correct work, and ultimately resolve this crisis.

The use of media brings this storyline to life and significantly enhances the learning process by sustaining interest, continuously leaving the learner with a ‘hook’, and providing elements of coaching that aid the simulations and game-based practice opportunities.

In between the highly engaging and dramatic media segments, the learner enters into a series of simulations and game-based activities. These exercises have the learner correct written communications, proposals and other works corrupted by Fach Trottel. Upon successful completion of these activities and simulations the learners have the opportunity to uncover and stop the corruption endured by Fach Trottel as an added bonus.
The power of the story

Given the audience is spread over 40 countries, international flavour and diversity was required for the success and uptake of this program. As the storyline progresses, characters from across the PwC network are introduced, which make the scenarios more appealing to the global target audience. Learners explore New York, London, Shanghai, Los Angeles and Vienna. Each territory introduces a new set of challenges, choices, consequences, knowledge, and practical guidance – all while investigating and uncovering the outbreaks of Fach Trottel corrupting the work of PwC.

The storyline is designed such that each character is both a suspect and a potential key to solving the mystery. Additionally, each character introduces a new set of challenges to be addressed which serve as the basis for the learning.

It’s not surprising that 100% of staff felt this programme kept their attention and 100% intend to use the tools on the job!

Whilst the production costs may have been higher, PwC have factored into the calculation the great reach of up to 170,000 staff and partners and an expected shelf life of up to three years. The programme has also been included as part of the global onboarding experience. As a result, the overall out of pocket cost was roughly $0.59 per learner which was deemed very reasonable given the learning effectiveness data to date.

Never stand still

The work at PwC under the influence of Sarah Lindsell has never stood still. Ten years ago we reported on the way that their approach\(^1\) helped set the standards for aligning learning to business needs, engaging stakeholders, harnessing technology appropriately and equipping L&D champions around the globe. Their two gold wins for their work ten years later shows the importance of using those foundations for delivering continual innovation and business success.

\(^1\) Linking Learning To Business - 2004

Developed by Towards Maturity. See [www.towardsmaturity.org/index/employer-stories/](http://www.towardsmaturity.org/index/employer-stories/) for more case studies and resources.
Tips from PwC for becoming a top performing L&D organisation

Defining need:

- At the earliest stages of design – get agreement from business leaders on the required tangible outcomes

Learner Context

- Understand your learners, what engages and motivates them
- Help them apply learning

Work Context

- Harness existing technology platforms for learning advantage
- Build learning into the recruitment and onboarding process

Building capability

- Build L&D confidence: Train up your L&D staff in the use of social media – provide guidance and model great practice
- Go beyond the course, use social media to support application of learning, collaboration and community
- Use media and assets to sustain interest (without becoming corny!)

Ensuring Engagement

- Manage change – use media to communicate and encourage engagement
- Ensure your design is globally applicable to connect with a diverse audience

Demonstrating value

- Identified the desired tangible value outcomes and measure accordingly
- Take a ‘Like, Learn, Leverage’ approach to understanding value
- Capture anecdotal evidence on video to quickly stimulate interest