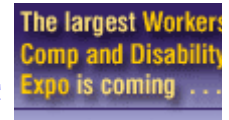




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The E-Collaborators Work for CNA

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By Grae Yohe

For many years, CNA Corp. had no centralized training department. Then, about three years ago, the Chicago-based insurer did an about-face: "Developing people" would be strategy number one, according to the company's new leadership. As the new vice president of organizational development, Christina Keener had her work cut out for her.

"There was nothing," Keener recalls. "Nothing was documented. We had no way of knowing what was being done, at what quality, and who was participating in it."

With the help of Collaboration Architects in Falls Church, Va., Keener ended up addressing training needs while simultaneously helping dispersed teams work better together. The solution - a network of online meeting places called "collaborative spaces" - handles both tasks under the same "collaboration" umbrella. Now, with leadership training in full swing and other pieces of the training puzzle in the hopper, CNA is addressing its development goals and saving big on travel expenses at the same time.

"One of the big areas of cost for us was that we had people flying all over creation," Keener says, adding that of CNA's approximately 18,000 employees, only about 2,500 work in or near the Chicago headquarters. "I knew that a lot of what we were going to do had to be done virtually."

The trick was that while a "virtual" solution would touch pretty much every one of these 18,000 workers across the U.S., Canada, Europe, South America and Asia, it would also necessitate using the Internet. It would mean putting a substantial infrastructure in place where there was no infrastructure; it most likely would entail technology headaches and a huge capital investment. To boot, Keener felt that traditional self-paced e-learning, though comparatively inexpensive, was just not up to snuff.

"It was too isolated," she says. "It felt too unnatural to people. They missed all of the learning that came from interacting with one another; they missed the learning that came from interacting with an instructor."

Two Birds, One Stone

The middle ground was blended learning, which would allow instructors to interact with students (who could interact with each other) via online tools like Web conferencing, chat rooms and threaded messaging. Students could caucus, swapping stories and asking questions. Participants could share content like text documents and PowerPoint slides. Using whiteboard software, all involved could work on projects together and, if needed, present to

the larger group.

To implement this blended solution, Keener turned to John Darling, co-founder of Collaboration Architects. She pursued and priced other vendors, but chose to work with Darling and co-founder Bill Bruck because the solution they proposed was highly flexible, able to incorporate technologies that CNA was already invested in (like MeetingPlace, a Web conferencing application) and is applicable to distance collaboration as well as distance learning - killing two birds with one stone.

There was a bonus. Because the collaborative spaces could be built piecemeal (a few at a time, adding bells and whistles later) and because Collaboration Architects, not CNA, would host them on the Web, the solution required expenditures only for what was up and running.

"I didn't have a huge capital investment, which is one of the things that appealed to me about this," says Keener. "John and Bill offered me the greatest range of capability - not just to put a space together, but also to consult with me about what my needs really were."

For sure, Keener's needs included training without travel. According to Darling, CNA also wanted to tap into its experience base; many employees were qualified to act as coaches and mentors. Because development goes beyond training, the company wanted to enhance everyday collaboration as well.

Training and teaming in collaborative spaces use the same basic model, says Bruck. That model says as long as everyone knows what they have to do and when it must be done, it's not necessary to "meet" often anyway, be it virtually or face-to-face. Synchronous sessions, like meetings, are conducted most often at the beginning and end of a project. In between, almost everything is asynchronous: one person does this, then another does that. They don't need to work together - literally speaking - at all.

Training works much the same way, with trainees working in "cadre groups" of about 10 people, Bruck continues. Live seminars kick off a class at the beginning and wrap it up at the end. In the middle, depending on the course, there are case studies and Q&A and maybe simulations - all done on a whenever-you-can-during-this-week sort of schedule. But, says Bruck, conversation is at the heart of collaboration. The back-and-forth that happens between virtual meetings involves, in large part, online threaded discussions. So what do trainees discuss, in the context of the course material? Why, their jobs, of course.

"One of the things [CNA] came to realize," Darling says, "is that most training is focused on providing people with the knowledge side, or the 'awareness piece.' What they really needed was to be able to take people through processes that would have them demonstrating skillfulness."

Through discussion and through applying course material to on-the-job situations, training and work at CNA are closely intertwined. Chatting and posting messages through an application called Caucus, employees might be assigned to come up with 10 questions. The instructor answers; trainees confer among themselves. Real-work situations are fodder for the conversations. Then, trainees put the ideas into practice, returning to the message rooms to give updates and ask more questions. The process repeats, with a coach or mentor guiding each student's progress, referring them to additional reference materials when applicable.

The final step drives the lessons home. To be certified, trainees must fill out and satisfy the

requirements of an "Accountability Plan."

"Learning - and true performance change - doesn't happen through compliance," says Bruck. "It happens through accountability, through saying, 'Here's what you need to show me you can do,' not 'Here's what to do' or 'Here's how to do it.' "

Each Accountability Plan is individual, outlining actions trainees will take over the next two months to prove to their managers that they've achieved proficiency. Certification comes once the trainees demonstrate their proficiency within the allotted timeframe.

At its heart, the Collaboration Architects system is less an application than it is an infrastructure, binding together other technological components. Voice/data conferencing, juiced-up threaded message boards (they're not static; they incorporate forms and polls), and educational courseware in most cases come from third-party vendors and are hooked into the collaborative spaces like spokes on a wheel.

"We've been able to just plug all kinds of stuff together and put a face on it," says Keener. "We're using Web-based training that in some cases we have bought from a vendor and in some cases we are building ourselves. We're using MeetingPlace because that's the voice/data conferencing tool that we have available at CNA. We're using polling software that we get from another vendor, through Caucus. And as far as your average user is concerned, this is all one thing."

The Change Factor

When it came to selecting a learning management system, CNA chose one from Docent Inc. The LMS ties into the rest of the system, tracking grades and progress as well as who's doing what and where they're doing it. Because the LMS is such a large and important piece of any e-learning venture, CNA and Collaboration Architects spent a lot of time comparing vendors and thinking through the decision. To do this, the deciding group worked together in - you guessed it - a collaborative space.

Combining the two systems involved a few glitches along the way, says Darling, but the technologies now work well together. "As we're doing some of the e-learning programs, we're working through how to get the Web-based training components to work effectively with the LMS system to work with the environment," he says.

Keener agrees. Most of the glitches have been resolved, but, as with any technology, there are always areas in need of attention. "Most of the problems we've gotten into [have to do with] people having trouble getting into our servers, to one thing or another," she says. A help-desk staff works with users who encounter such problems, she adds.

The biggest glitch for CNA, however, was a human one. Keener's advice is to not ignore change management concerns, which she admits to glossing over during the early stages.

"We put very, very little thought into how we were going to introduce people to the space, how we were going to encourage them to use it," she says. "We pretty much drove them with a stick."

The response, she adds, has been good - but not as good as it could have been. Early on, people became easily frustrated when they couldn't immediately find or do what they wanted, and gave up. Training, bit by bit, has helped. Keener has the following advice for companies

thinking of implementing this type of solution: "Spend an inordinate amount of time thinking about: What are the barriers to adoption? That's the biggest issue we've had to deal with."

Keener says the system's cost has been "almost a non-issue." She wouldn't speculate on the overall return on investment, but says the ROI on each part of the big project has been immediate. As an example, she cites the collaborative group that chose the Docent LMS. The cost to design and develop the space was recouped within the first month, purely due to a savings in travel costs.

Training ROI has been similarly dramatic. Nearly 200 students are enrolled in the company's Business Leadership program, with an additional 200 scheduled to participate shortly. Each student is in the program for a year, participating in various interactions and meetings. Keener says the program costs approximately \$100,000.

"If I were to bring these people into Chicago and deliver this program with the same level of quality - we're talking top flight programs: Ken Blanchard's Situational Leadership II, Tom Peters' Capturing Brand You - if I were to actually pay for this live, the cost would be in the millions."

After about a year up and running, excitement in the company is building. Three training programs are online, with a fourth coming soon. Two more are being built. All of these are leadership courses, but the next step is hard skills: underwriting, claims, risk control. For virtual teaming, Bruck and Keener estimate that 50 projects are being conducted in four spaces right now, with another five or so in development.

"It's like watching critical mass," says Keener. "Now, everybody wants to create [a project]."

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