

MONITOR EXECUTIVE DEVELOPMENT

# Just-in-Time EXECUTIVE DEVELOPMENT

LEARNING WHAT, WHEN  
AND WHERE IT'S NEEDED

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**A manufacturer planning** to launch 40 new products over the next few years discovers, just six weeks from the start of rollout, a painful breakdown in market planning. The analysis of costs, competitors, and likely revenues done by each brand team are spotty, at best. Worse, each team seems to be following its own market planning process, no two of them alike. Methodologies vary, so do terminologies and tools. This makes meaningful comparisons impossible. Priorities are unclear. Choices cannot be made.

Worse still, the situation is not likely to improve any time soon. Although these teams are all located within a single building, it may as well be the Tower of Babel. They cannot share because they do not speak the same language. To make matters worse, rapid growth has brought in a flood of experienced hires from many different companies who bring even more unfamiliar languages into the mix.

What to do? A logical approach, of course, would be to train the teams—fast—to use a standard set of methods, tools, and technology. But exactly what kind of training will work? Certainly not traditional classroom training! As Exhibit 1 suggests, classroom training, by definition, follows a “learn-do” sequence. That is, it uses curricula prepared in advance to help trainees prepare for future actions that are already anticipated—the antithesis of the spontaneity needed here. Moreover, the format of such programs is full immersion, away from the job, which could be catastrophic in this case. These teams simply have to stay where they are and keep moving.

What about using a typical, one-off, post action review—the “do-learn” approach, where learning follows action, also described in Exhibit 1? Wouldn’t this help? Not really. Reviewing what’s just been tried, either in real life or via simulation, and then

**Exhibit 1: Traditional Learning Models**

	<b>Classroom (Learn-Do)</b>	<b>Post-Hoc (Do-Learn)</b>
<b>Characteristics</b>	<ul style="list-style-type: none"> <li>• Prepare for the <i>future</i></li> <li>• Learning is designed to anticipate action</li> </ul>	<ul style="list-style-type: none"> <li>• Learn from the (immediate) <i>past</i></li> <li>• Learning follows action</li> </ul>
<b>Program Format</b>	<ul style="list-style-type: none"> <li>• Multiple-day immersion events</li> <li>• Aligned to anticipate short- and mid-range strategy execution</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitator-led, off-sites</li> <li>• Reviews that focus on analyzing past, learning is iterative</li> </ul>
<b>Overall Goal</b>	<ul style="list-style-type: none"> <li>• Have capabilities to support core business strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Learn from major actions and events to improve future efforts</li> </ul>
<b>Mindset</b>	<ul style="list-style-type: none"> <li>• Proactive</li> </ul>	<ul style="list-style-type: none"> <li>• Reflective/ retrospective</li> </ul>
<b>Benefits</b>	<ul style="list-style-type: none"> <li>• Builds new capabilities that are needed to support new, strategic directions</li> </ul>	<ul style="list-style-type: none"> <li>• Continually refines the process through deliberate review sessions</li> </ul>
<b>Expertise Required</b>	<ul style="list-style-type: none"> <li>• Planning and developing “high end” learning programs</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitating open communication on lessons learned</li> </ul>

pondering lessons learned is a good way to improve implementation, not to fix an urgent problem. Further, having one team record lessons and then pass them along to the next simply cannot help all 40 teams change their processes within six weeks. There just isn't time.

Perhaps the best to hope for is stopping the action for a few teams, so that at least some of the managers can learn well what they need to be doing within the required time window. Better than nothing, certainly, but not even close to good enough. When there is an urgent need for a solution to a business problem that requires fast learning across many organizational teams or units, followed by immediate execution, traditional learning approaches simply are not the answer.

Fortunately, there is a learning approach we've observed emerging in some companies that addresses exactly this sort of challenge. Although it's not yet widespread or fully developed, it has already demonstrated great promise—and great results. What we call “just-in-time” or “do-learn-do” executive learning provides a means for line managers to capture new knowledge and develop new capabilities, spontaneously, in real time. The way it works is that, as senior teams respond to an urgent business problem, its members learn while they are doing, according to need, in a series of increments that begin right then and there and end in a few days or weeks.

Managers learn right where they are, when the need is high and the action hot, in compressed chunks of time, and in ways that mesh seamlessly with their company's ongoing problem-solving efforts. This article is an in-depth exploration of this new learning approach and some of the challenges a company might face in trying to adopt it.

## How It Works

Traditional classroom training, done well, can be extremely valuable. It has, time and again, proven itself to be an effective way to transmit certain types of knowledge within specified contexts to the people within an organization. In rapidly growing organizations, for example, it is often a great way for a firm's directors and officers to be brought up to speed on changes in strategy and build their alignment to the new strategy. However, because its underlying logic is for people to learn and then go forth and do, it

## Fast learning that also yields timely action calls for a different approach.

is not designed to quickly change behaviors in response to specific, urgent needs that arise unexpectedly.

At base, classroom and post hoc learning both rely on “pushing” learning out to leaders (away from their jobs) in order to improve their ability to tackle critical, strategic issues, in concept and execution. Learn-do and do-learn exercises do not really address the challenge of fixing urgent problems that require company-wide, fast-track learning, and without pulling managers off the job.

Fast learning that also yields timely action calls for a different approach; and there have been attempts. In fact, the latest variations of the familiar do-learn model—the multi-day, off-site strategy session and “action learning”—have caught fire with many leaders precisely because they were frustrated by the limitations of prior approaches. (Action learning is a variation of do-learn that

convenes an ad hoc, cross-functional team to solve a one-off, strategic problem—for example, should a firm enter the Chinese market. The team is usually disbanded when the session ends.)

But these variations still pull leaders away from their jobs and are thus limited in what they can accomplish during a costly chunk of “stolen” time. So, the gap remains. And

not surprisingly, this has led to experimentation that reaches beyond the confines of do-learn and learn-do.

Looking over the sum of such efforts, we have begun to see an interesting new approach emerging, in which people learn while they are working—just in time. The learning doesn’t happen in a classroom, nor does it occur during a post-hoc, off-site

**Exhibit 2: Comparison of Traditional Learning Models to Do-Learn-Do**

	<b>Classroom (Learn-Do)</b>	<b>Post-Hoc (Do-Learn)</b>	<b>Just-in-Time (Do-Learn-Do)</b>
<b>Characteristics</b>	<ul style="list-style-type: none"> <li>• Prepare for the <i>future</i></li> </ul>	<ul style="list-style-type: none"> <li>• Learn from the (immediate) <i>past</i></li> </ul>	<ul style="list-style-type: none"> <li>• Learn from the <i>present</i></li> </ul>
	<ul style="list-style-type: none"> <li>• Learning is designed to anticipate action</li> </ul>	<ul style="list-style-type: none"> <li>• Learning follows action</li> </ul>	<ul style="list-style-type: none"> <li>• Learning is embedded <i>in</i> the action</li> </ul>
<b>Program Format</b>	<ul style="list-style-type: none"> <li>• Multiple-day immersion events</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitator-led, off-sites</li> </ul>	<ul style="list-style-type: none"> <li>• JIT learning events</li> </ul>
	<ul style="list-style-type: none"> <li>• Aligned to anticipate short and mid-range strategy execution</li> </ul>	<ul style="list-style-type: none"> <li>• After-Action-Reviews (e.g., US Army), executive retreats, meetings</li> </ul>	<ul style="list-style-type: none"> <li>• JIT problem-solving methods with “just enough” learning interventions</li> </ul>
<b>Overall Goal</b>	<ul style="list-style-type: none"> <li>• Build new capabilities to support core business strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Learn from major actions and events to improve future efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Integrate learning opportunities, as they emerge, into the on-going execution of key strategies</li> </ul>
<b>Mindset</b>	<ul style="list-style-type: none"> <li>• Proactive</li> </ul>	<ul style="list-style-type: none"> <li>• Reflective</li> </ul>	<ul style="list-style-type: none"> <li>• Adaptive</li> </ul>
<b>Benefits</b>	<ul style="list-style-type: none"> <li>• Builds new capabilities in support of the new strategic directions</li> </ul>	<ul style="list-style-type: none"> <li>• Continually refines the process through deliberate review sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Continually supports the execution of the strategy with just-in-time, just-enough learning</li> </ul>
<b>Expertise Required</b>	<ul style="list-style-type: none"> <li>• Planning and developing “high end” learning programs</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitating open communication on lessons learned</li> </ul>	<ul style="list-style-type: none"> <li>• Leveraging learning as a “managing change” strategy</li> </ul>
<b>Dangers</b>	<ul style="list-style-type: none"> <li>• Over-design and engineering of learning objectives (difficult to assimilate and implement)</li> </ul>	<ul style="list-style-type: none"> <li>• Not dynamic – learning occurs <i>after</i> the game is over</li> </ul>	<ul style="list-style-type: none"> <li>• If not done well, JIT could = lack of rigor and sustainability</li> </ul>
<b>Overuse</b>	<ul style="list-style-type: none"> <li>• Too much energy goes to learning – not doing</li> </ul>	<ul style="list-style-type: none"> <li>• Learning events become redundant</li> </ul>	<ul style="list-style-type: none"> <li>• Too much ad hoc overshadows much needed aerial views</li> </ul>
<b>Misuse</b>	<ul style="list-style-type: none"> <li>• Just-too-much-stuff</li> </ul>	<ul style="list-style-type: none"> <li>• Just-in-case-anybody-asks</li> </ul>	<ul style="list-style-type: none"> <li>• Just-enough-to-get-by</li> </ul>

review. Instead it takes place in a series of continuous learning exercises that train people just in time (see Exhibit 2), right where they are, while they are solving their most pressing challenges. Moreover, it's not just another form of "action-learning" by an ad hoc, cross-functional team. Instead, as Exhibit 2 suggests, it focuses on continual learning and adjustment by any number of intact teams, en masse, the members of which will also continue to be responsible for applying this learning through line execution, over time.

We think this new learning approach to time-sensitive, urgent needs has great promise. In fact, we have used it, and it works. We do not think—and certainly do not want to suggest—that it should replace all the dominant learning approaches currently used in organizations. Each approach depicted in Exhibit 2 can play an important role.

We do believe that as needs vary, so should the approach employed. The key, of course, is to match the approach to the need. And by meeting a previously unmet need, just-in-time learning provides an important complement to the existing portfolio of learning models and variants.

## **A Toyota Experience**

To illustrate how just-in-time executive learning can work inside a real company, consider the example of Toyota's U.S. subsidiary, Toyota Motor Sales (TMS). In an effort to apply its "lean" philosophies to the service side of the business, the company embedded a group of consultants from Toyota's corporate university within TMS's strategic project teams. The consultants' sole mission was to help the project teams "learn their way to success" by learning as much as possible in order to best address real challenges in real time.

One of these project teams was in the process of developing new-product brochures when an executive leading the team discovered that customers in some locations were not able to get their hands on product information relevant to their market. He immediately called his team together and charged them to pick one product and think about it differently, with the goal of communicating options and model information in specific markets. They set to work, quickly realizing that customers could get the product information they needed in a timely fashion if the company simply offered the material online.

But, importantly, as this was happening, the embedded learning team members also realized that other products could benefit from having brochures available to consumers on the company's Web site. Plus, they thought, why stop there? Why not look for additional ways to enhance the impact of the company's product information?

At the request of and in cooperation with the team's executives, the consultants facilitated a learning intervention, right then and there, in the same rooms where the product team had been hard at work for a number of weeks. That made it easy for team members to be able to grab relevant data or find a colleague in a supporting department who had important information to offer. Over several days, this effort played out through focused working sessions, facilitated by Toyota's own executives and in-house learning consultants.

It included intensive, no-holds-barred analyses, as well as interactions with dealers, advertising, and other functional areas. The team quickly identified several high-impact improvements. Some brochures, for instance, had errors in them. So the team set

up a proof-reading system that would catch those errors before copy got posted on the Web site or went to print. For dealers who had been frustrated because consumers were getting brochures that described product options that were not available to customers in their respective geographic locations, the team devised new processes. These enabled the company to provide customized, more accurate brochures to consumers in every location, which could be printed anytime, anywhere by downloading selected feature descriptions from a constantly updated, online menu.

The learning intervention closed with a series of analyses that showed demonstrable benefits along several dimensions of value-added performance. Typically, at Toyota, performance measures focus on one of four key impact areas: revenue/cost enhancement, improved cycle time, improved customer satisfaction, or employee productivity. With these data in hand, a service manager can—in real-time—approve or modify a plan or send a team back to do more work. In this case, the sponsoring executive got the insight he needed to roll out a nationwide program and to integrate this project with other strategic initiatives underway at the time.

Demand for the online brochures went up. Costs went down nearly 50 percent. Satisfaction rose—and so did mastery of reusable new tools for adding value to similar efforts in the future.

### **The Four-Fold “Way”**

All successful do-learn-do approaches, in our experience, rely on an empowered learning team that is embedded—in this case directly—within the relevant business unit to address a real-time agenda that has been

“pulled” into action by an executive who spotted an urgent need and had a credible way to measure success. All four of these elements appear to be essential:

- 1. Fully empowered learning teams** that have the right skills, mindset, and senior management support to facilitate effective interventions.
- 2. Embedded learning professionals** who have earned a seat at the decision-makers’ table by winning the respect and trust of senior management.
- 3. “Pull” by line or senior executives (versus “push” by learning and development organization)** To be effective, this type of learning must be “pulled” onto a company’s priority list by senior line executives who are motivated by real-time, urgent needs, not pushed on the organization by learning professionals according to some pre-existing agenda.
- 4. Demonstrated, value-added impact**, that is, not merely anecdotal but, rather, based on concrete measures of value delivered.

Let us take a clear look at each.

### **Fully-Empowered Learning Teams**

Just-in-time executive learning depends to a great extent on a company’s having the right people on hand. But who are the “right” people? In what we’ve seen and done ourselves, they are generally learning experts who have earned the respect of C-level executives and business unit managers. They are the go-to people for designing major initiatives that require learning while the leaders in question continue to move full-speed ahead in executing management priorities and solving problems.

In many companies, these individuals can be found within the ranks of learning and development (L&D) leadership—for example, the CLO and his/her staff. They are in the know about important challenges. Being embedded, they are ahead of the curve, prepared to identify learning needs and opportunities spontaneously and to respond to them. Because of their proven track record of delivering value, senior management has the intention of fully employing them to meet urgent, fast-cycle challenges.

To these challenges these “embeds” bring a clear understanding of what new knowledge is required, how to transfer it quickly to where it is needed, and how to develop it efficiently if it does not exist. They also have a genuine familiarity with the latest learning methods and learning occasions. In practice, this means they have the hands-on experience and skill to:

- Spot learning opportunities
- Design “just-in-time” learning experiences
- Codify both the substantive and process knowledge gained through discrete

interventions so the whole organization can benefit

- Inspire the trust of senior decision-makers
- Act as risk-takers in what are, by definition, highly experimental interventions

Traditional learning and development specialists rarely share this profile.

Exhibit 3 below summarizes the fundamental changes in skills that we believe would most likely need to be made by L&D leaders who wish to emulate the JIT learning experiments we have observed.

### Embedding Learning Professionals

Effective JIT learning further requires that the professionals with these skills and experiences be embedded in the line organization. In literal fact, it does not seem to matter whether they are physically co-located with senior managers or so closely linked to their activities as to be literally on call.

What does matter is that these professionals are, on a daily basis, so intimately tied to real work as to be privy to the company’s or busi-

**Exhibit 3: Learning Professionals Transition From Traditional Executive Learning Approaches To Just-In-Time**

Old Skills	New Skills
Plan per yearly program cycle	Seize opportunities per “spot market”
Traditional program design	Rapid-cycle program design
Engage in large-scale, long-range knowledge management	Codify and disseminate lessons learned, quickly and broadly
Defer decision rights to senior management	Have credible “seat at the table” with senior management
Risk neutral	Take risks
Often based on business-school like learning curricula	Employ latest, quick-to-market learning approaches

ness unit's unfolding strategic challenges. They have to know the managers and their groups, inside-out. They have to know what's been going on and what's on the table. Only then can they proactively alert management to the need for, as well as design and facilitate, learning interventions precisely tailored to current needs. Such embedding also helps ensure that the fullest measure of learning gets harvested from each intervention.

### **Pull Instead of Push**

JIT learning, by its very nature, cannot be defined up front and "pushed" into an organization. In advance, its particular forms are not on anyone's agenda. They arise as needs arise. Open-ended, opportunistic, and real-time, they are pulled onto the main stage, spontaneously, by real developments

Effective JIT learning further requires that the professionals with these skills and experiences be embedded in the line organization.

in the real world. To some, this may seem like heresy. But there is simply no traction in trying to forecast JIT learning needs before the fact. No one knows. Through "pull" – not "push" – the University of Toyota introduced the JIT approach to the Los Angeles Police Department (LAPD).

It is important to note that the LAPD operates in an environment (like Toyota's), where it is difficult to pull its leaders and officers out of their critical public safety missions for training. Recognizing this factor, and as a community service, Toyota urged the Depart-

ment to test their lean thinking curriculum that leverages the JIT learning principles.

Getting the ball rolling at LAPD turned out to be mostly a matter of "mining" the Department's collective expertise, which, of course, made them feel great. Members of the Toyota learning team turned to line managers and employees in various divisions for JIT tips. Then, by facilitating learning interventions, the learning team helped one group of officers save half a million dollars by improving booking procedures in the jail system. Even though there were no learning professionals embedded in the various LAPD operations at the start of the effort, the Toyota team made converts by sensitizing key people who were deeply immersed in the operations of each area and who were, accordingly, best equipped to analyze what was happening and suggest improvements.

Taught to look for situations when just-in-time learning could deliver cost efficiencies, the trainees ultimately became embedded trainers who then helped their units to learn from doing, make improvements, learn more, improve again, and so on. It became a bona fide do-learn-do experience for all concerned. Just their first attempt ended up saving hundreds of thousands of dollars. Currently, the LAPD is planning to have the University of Toyota certify internal JIT specialists who will not only lead the improvement projects but facilitate the long-term learning objectives of the department.

### **How to Demonstrate Value**

It has always been a challenge peculiar to executive learning and development that it can be hard to demonstrate in dollars the return on investment delivered by successful learning programs. JIT executive learning

is no exception. In fact, because the best we have seen is so integral to day-to-day management, it may be even more elusive than traditional learning approaches, in lending itself to discrete measurement. So, we want to share what we know about it thus far. In our experience, effective users of JIT learning employ one or more of the following three approaches to demonstrate JIT's value to senior management.

### **1. Natural field experiment**

The most objective way to demonstrate the success of a just-in-time executive learning program is the natural field experiment. Briefly, this approach involves running an intervention in one part of an organization (or geography) and not running the intervention in a designated "matched pair" location.

For example, one company matched up a region in the U.S. that conducted a sales training program for a new product launch with a comparable region of the U.S. that did not get the sales training. All other factors being equal, they were then able to pinpoint the causal effect of the intervention on sales, profitability, and other financial measures.

### **2. Objectives-based assessment**

With JIT learning, as with any initiative, objectives for a particular program are set a priori. It is, therefore possible to compare performance against up-front management expectations. If financial outcomes run, say, a third higher than projections, management can discuss which portion of the incremental sales was most likely attributable to the JIT training. While they may debate the exact percentage (see below), just having the discussion will make clear that the learning yielded significant results.

### **3. Pre-post experiments**

A similar approach also useful for demonstrating impact is to measure controlled experiments in the field against baseline metrics of performance. One learning/management team had five-year data on a product that was increasing sales at 10 percent per year. They then designed a JIT training program specifically intended to increase growth to 20 percent per year. By carefully designing an experiment in a particular region (e.g., they did not change sales rep compensation during the test), they began to have confidence that they could attribute any change they might experience to the JIT learning intervention. As they were able to run this same intervention in multiple regions, they became all the more confident in their conclusion that the JIT intervention had created the positive impact observed.

### **Getting Started May Be Tough**

Admittedly, just-in-time executive learning is still in its formative stages. But so many companies need a way to bridge the gaps left by traditional training programs that we believe this approach is going to pick up steam fairly quickly. We recognize, however, that many aspects of JIT learning may appear daunting to senior managers and executive learning and development leaders, alike. Organizational turmoil, possible shortages of qualified learning consultants, and simple inertia will likely make adoption challenging, even for those who recognize the value to be gained. Nevertheless, our view is, why wait? The downside of continuing to do business as usual, especially in mature companies, is far greater than the risk of trying something new. So let us consider the approach we describe above in

## WHAT METRICS TO EMPLOY

So there are ways to demonstrate that something good resulted from a JIT learning intervention. But these days, for many companies, that won't be enough. When performance improves, how does a company tease out the actual portion that was a direct result of the learning intervention? As we've studied these experiments, we've observed three categories of metrics used to measure program impact: (a) behavioral change; (b) business process change; and (c) financial impact. Each has been effective in situations that might otherwise have defied measurement of any kind.

### Behavioral Change

Consider, for example, a company whose just-in-time program was designed to institutionalize a new approach to market planning. The old approach—a focus on marketing tactics—contrasted sharply with the new emphasis on strategic, market analysis prior to developing marketing tactics—that is, on things like customer behavior, channel partner actions, competitive activities, and overall macro-movements in the marketplace.

A new 10-step marketing planning process actually linked a new, upstream, strategic analysis with the more familiar downstream tactics, setting the desired change in behavior as a specific, performance target. At the end of the JIT learning intervention, all marketing teams not only had their new plans, they also had shifted the mix of their work to include both up- and down-stream elements. In the ensuing months, the marketing leadership was able to track a “scorecard” of behavioral changes on the part of individual team members (e.g., did they use the tools, did their marketing tactics change, was the marketing spend more targeted?)

### Business Process Change

Similarly, some companies track whether a new business process was implemented as a result of a JIT learning intervention. Here, the unit of analysis is applied at the level of a firm-wide process, as opposed to the behavior of an individual or even a team. One company we recently had the opportunity to observe was in the process of instituting a new, just-in-time approach to strategy formulation that employed a new set of tools at each step along the way. In this case, the catalyst for change was an internal strategy consulting practice that had urged the company's JIT learning experts to lead the way. Since the firm had a large number of business units that were required to provide strategy reviews, once the learning intervention was completed, it was easy to assess the overall percentage of business units that adopted the new process.

### Financial Impact

While it is often more difficult than not to demonstrate a specific, financial impact of JIT learning, any or all of the above value indicators and metrics can sometimes be translated into specific dollar amounts or at least percentages. This was true, for example, in the LAPD program where learning interventions not only changed behaviors, but yielded clear, quantifiable, cost savings. All told, we provide all the above options with the proviso that the more tangible the value that can be demonstrated, the better.

terms of actually doing it for the first time. How difficult might it be? What are the likely pitfalls? Are there workarounds if the going gets tough?

### Embedding Is Easier Said Than Done

Integrating trained learning professionals into business units is not a trivial undertaking. Line managers are not likely to accept a corporate learning professional as a trusted colleague unless that person (a) understands the business unit's strategy inside/out; and (b) knows everything about that unit's product. In addition, many companies have been doing the same kind of learning programs for decades. It may not be in their blood to experiment without a pressing need to do so.

That is why we think it far better to try to get an existing L&D professional up to speed then to bring in someone cold, or even from a relevant line unit, to develop a company's first JIT intervention. Our experience indicates that qualified people are less likely to be “found” inside a business unit than they are in a learning organization. Is it possible to teach a line manager to have the desired facilitative, consultative attitude, and a keen interest in trying out a new learning approach? It's debatable.

That said, many competent L&D professionals have subject matter expertise, but not the skills needed to help change a team's behavior, especially in situ, as opposed to inside a classroom. All told, right now, we feel there's room for experimentation. The best embedded “starter” for your unit might even be someone located somewhere else, entirely, in the organization.

## Not All “Pull” is Created Equal

As noted above, just-in-time executive learning is “pulled” onto leadership’s radar screen and into a group’s activities by a company’s real-time, urgent needs and, ideally, by alert, embedded learning professionals who spot those needs. However, when a company is just starting to experiment with these interventions, it can be tricky to choose which “pull” to respond to. Our experience indicates that it’s a safer bet to choose to respond to one that all but guarantees a double, triple, or home run. And, since striking out on the first intervention can lose enormous credibility and momentum, it also seems wise to over-resource the first effort or two.

At the same time, it also seems important not to get carried away. Consider one company where a C-level executive was reticent about launching just-in-time learning. His concern was whether the organization would adopt it, and he knew better than to try to force it into the organization. So he tried to get some alignment among his vice presidents. Although they all voted for the program, their respective levels of interest were mixed. The turning point came when management deployed learning consultants into the business units for three months. One initiated a highly successful intervention. And once that happened, virtually everyone else wanted to try it too.

Too bad it turned into a stampede. As it turned out, the JIT interventions at that firm lost their impact when they were trotted out willy-nilly in response to every emerging issue. The secret seems to be keeping the number small and focusing on taking

special care to make each one successful.

At Toyota, for example, when the effectiveness of increasing interventions appeared to waiver, the consultants and imbeds just cut back the number of attempts. This put the JIT approach right back on track.

## TOYOTA UNIVERSITY’S CERTIFICATION PROGRAM

Toyota has a year-long certification program administered by the University of Toyota’s learning consultants and aimed at training line managers to be JIT leaders. The University of Toyota already had a corps of trained learning consultants who were embedded in the company’s business unit organizations. Once they launched just-in-time learning for the units’ executives, their next goal was to find and certify the person inside each unit who was best qualified to design and lead JIT learning for the longer term.

In one case, a learning consultant found someone in the Finance Department who really resonated with learning interventions and had a knack for implementing such efforts. The consultant provided on-the-job training and guidance to that finance manager, who then became a fully-certified, embedded learning resource. Today, that business unit manager is an embedded, skilled learning expert respected by his colleagues across the organization for this aspect of his job, as well as being the unit’s JIT learning champion.

Please note that the organization’s leadership made this line manager’s role as the JIT “guru” a big part of his regular job, but not 100 percent; that seems critical to note. At Toyota and probably most companies, the most credible person to business unit peers is not necessarily the one who does learning facilitation full time. Peers may more readily accept someone who is still perceived as having a “real” job within the unit’s line organization.

Toyota now has some five line managers in various business units who have gone through a year-long certification process, mentored by their embedded learning consultants. We do mean mentored, not trained or sheep-dipped in special areas of expertise. Also, part of why it’s working so well may be the program’s elite profile. Not everyone who is in the program gets certified. Instead, the program is so rigorous that not everyone who starts the process makes it. The “wash out” rate is currently over 50 percent, quality standards have to be tough; there is little margin for error with JIT.

The clock does not run out. At Toyota, once a business unit executive is certified, the consultant does not go away, but instead continues to be assigned to that unit. Nor do these consultants get special titles or get to build special learning team hierarchies. Doing so would kill the vitality that gave the program its legs.

### *Budgeting for the Unexpected*

Even so, given that the very heart of this approach is to encourage such interventions to be spontaneously pulled into action by urgent needs, how do you budget and staff for that? Importantly, our experience indicates that organizations would likely need to consider two forms of budget: (1) the traditional yearly budget that is associated with learning and development organizations and (2) just-in-time budgets that are established within business units (or even by product line, within selected firms).

Where a traditional budget was used, planners simply added dollars for a reasonable expectation of JIT throughout the period to what they normally allocated for the company's classroom and "do-learn" activities. The second type of budget allocation was discretionary. Over the course of the year, business unit leadership was able to access those funds opportunistically for those JIT interventions they believed would most benefit the unit.

The notion that the JIT learning budget resides within the business unit is consistent with our finding that successful JIT interventions were demand rather than supply-driven. However, it does not mean that the learning and development organization had no input to the decisions. They did. But—and this seems crucial—by owning the budget, the management team was all the more likely to have maintained full co-ownership of the program and its quality. And this, in turn ensured that (a) the approach continued to unfold carefully, as delineated in Exhibit 2, rather than taking on a life of its own, and (b) that the management team stayed fully involved, rather than abdicating or delegating its critical role.

### *Senior Management Champions Are Critical*

How high up do managers need to go to find the first business unit champion? The higher, the better. A less senior person might, of course, lead the charge quite well, but the advantages of seniority are many. A senior manager can, for instance, free up resources, lend credibility, create profile and buzz, and communicate results within a larger network. Just involving senior people peripherally does not seem to pan out. From what we've seen, at least one of these senior people has to be a genuinely enthusiastic champion of the intervention, or the whole thing withers. But one successful champion can make a huge difference.

Realistically, there are also likely to be situations where there simply isn't going to be a senior enough business unit person interested at first, or situations where there is reason to believe the organization is simply too risk-averse to accept an L&D embed within the line, no matter what. In these cases, we suggest modesty: a smaller, less risky effort with a much lower profile. In other words, try it out in Omaha before bringing it to Broadway.

### *Effects on Learning Organizations Can Be Problematic*

We've observed some jealousy among members of established L&D teams who are passed over for these sorts of assignments. Even though they may not be a good fit in skills or temperament, they can still feel left out of something important if a "new" group appears to be getting all the resources and management kudos. In some organizations this reaction has been so severe that the people who have gotten assigned have actually felt compelled to hide their success.

Better, then, to frame and treat the new direction as a product development effort. It's generally accepted that any L&D organization is going to have certain product development work going on all the time. Further, it's virtually gospel that every L&D team should always be asking themselves to come up with new and better methods. Hence, if there's likely to be trouble ahead, put on the camouflage early.

### *When Is An Intervention Warranted?*

Whoever sounds the first alert, how did the embedded learning professionals we observed—or senior managers, for that matter—determine when a JIT intervention was warranted? The best “screening” we have seen in practice asks two questions:

1. Is the issue of strategic significance to the firm?
2. Can a learning design be crafted in a way that delivers a practical solution but also creates a learning experience that converts the solution (or the process used to achieve it) into new organizational knowledge?

### **Fully Empowering Learning Teams is Hard**

A fully-empowered team has the right skills, mindset, and financial support to initiate and facilitate effective interventions. To make certain the people you choose meet these requirements, we suggest you begin by looking at the above chart (Exhibit 3) to see what “new skills” you need. Think, too, about whether there are any others that might be unique to your company.

Then look around to see whether you can find people who have, at least, most of the

requisite skills. What people often don't realize is that this is still early days in JIT learning, so experimentation seems like a good thing. You can search out this talent, wherever it may be, whether that's inside the learning organization, business unit, or even elsewhere in the organization.

Some companies that have not found strong candidates in their learning and development organizations have opted to use external partners to help them think through and launch just-in-time learning interventions, transferring the responsibility to company insiders as soon as they are trained.

In the best of all worlds, we would like to see such imported experts immediately launch some programs inside of the learning and development organization that are a lot like what needs to be done in the business units. In other words start spreading the JIT “virus” by launching some JIT interventions related to the learning organization's need to gird up for JIT learning.

That might give the people there a chance to get comfortable with this approach in a safe place where they can try on some of these ideas before taking them to the business units. It might also help learning leadership identify and prepare the internal candidates with the kind of profile that is likely to succeed when embedded in the units.

In terms of tenure on the professional learning side, our experience is that very junior people who have been with the company only three or four years have nowhere near the credibility to take on this role. The best bet is probably someone who's at least mid-career—maybe with 10 or more years with the company, who has the skills, who is likely to be frustrated with the current

approach, and who is willing, able and highly motivated to experiment with new approaches. Moreover, we believe it's best for this person to volunteer.

A fully-empowered team has the right skills, mindset, and financial support to initiate and facilitate effective interventions.

**Today's rapidly changing business arena is making increasing demands on company management to learn new things all the time, simply in order to hold their competitive position, let alone improve it. We no longer have the luxury of taking a time-out to learn these new things.**

**And it's getting ever more difficult to syndicate learning across large, geographically dispersed management populations, particularly within the tight lead-times we are seeing. Neither traditional classroom, nor post hoc learning, is well positioned to step into the breach. But a new, just-in-time, learning approach seems to hold promise. We hope to see more of it. •**



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Bernie Jaworski is the president of Monitor Executive Development, a member of the Monitor Group, which helps clients succeed through improving capabilities and developing leaders. He previously was the Jeanne and David Tappan Marketing Fellow and a tenured, full professor of Marketing at the University of Southern California. He has co-authored four textbooks on e-commerce, the most recent of which is Best Face Forward published by Harvard Business School Publishing (2005).

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