

Coaching as a Valuable Means of Developing Leaders

Driving Performance at Informatica

—Kim Lamoureux, *Senior Analyst* | April 2007

▶ IN THIS CASE STUDY

This case study illustrates how Informatica Corporation, a leading provider of enterprise data integration software and services, leveraged a coaching model to accelerate the learning of its managers throughout its global organization. By using this coaching model to help managers master management best practices, the company is able to disseminate core management curricula cost-effectively, consistently and globally.

Informatica's commitment to learning and executing the management curricula included the establishment of a global learning and performance group. This group challenged the company to embrace a unique learning model that eliminated the classroom and facilitated individualized development with one-on-one coaching.

The management curricula and its delivery via the coach-based learning model have single-handedly instilled a culture of continuous learning among employees at Informatica. While the company has adapted this coaching model to its management development program, the coaching model can very easily be

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applied to leadership development programs, as well. In addition, this model has provided a means for capturing the intellectual capital of top performers and organizational learning outcomes – which are disseminated back into the organization, contributing to the continuous improvement of the learning content itself.


This report will highlight the strengths of this coaching model, and the key differences between the model and traditional training and coaching processes. 

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Informatica: An Overview

Founded in 1993, Informatica Corporation (NASDAQ: INFA) delivers data integration software and services to solve the problem of data fragmentation across disparate systems – helping organizations gain greater business value from all of their information assets.¹ Informatica is headquartered in Redwood City, California, with total annual revenues of \$324.6 million and more than 1,200 employees.

Organizationally, Informatica is comprised of global offices in more than 40 countries. Serving a diverse and global customer base, the company markets and sells its software and services through its global sales force in North America, Europe and Asia-Pacific.²

Informatica has more than 2,700 customers representing a worldwide range of corporations, and governmental and educational institutions. Targeted markets include energy and utilities, financial services, government and public sector, healthcare, insurance, manufacturing, retail, services, technology, telecommunications and transportation.³

The Informatica Learning Environment

The global HR learning and performance group manages what is referred to as “human performance systems,” including performance management and learning management. In addition, this group is responsible for internal employee development, including management, leadership and professional development. The global HR learning and performance group’s subject matter expertise is in human performance technology and instructional design.

Informatica uses what Bersin & Associates defines as a “federated model,” which has a small core team that manages some technology and corporate programs, while empowering business and functional units to

¹ Source: Informatica website, “Informatica Corporate Overview,” <http://www.informatica.com/company/default.htm>.

² Source: http://www.informatica.com/company/investors/2005_10k.pdf.

³ Ibid.

run their own training programs.⁴ Some training is decentralized, with various business representatives partnering and collaborating closely with the global HR learning and performance group for instructional design and program development, as well as strategic planning.

Management Core Curriculum

Informatica wanted a program that would provide its managers with core foundational skills and the basics of good management. Like many companies, it was faced with the following challenges:

- Lack of consistency in its management best practices;
- Difficulty in capturing manager best practices (e.g., organizational learning and intellectual capital);
- Managers are very busy and consider training a lower priority;
- The company focused on strategic growth, the cornerstone of which is expert, world-class managers; and,
- Reaching all managers globally across different management levels⁵.

The director of global HR learning and performance was quick to point out that the objective of the program is to build foundational management skills. While some program content includes leadership best practices, the core focus is on foundational management skills. When asked how she differentiates between management and leadership, she responded:

“The line between management and leadership is often blurred, because good managers should also possess leadership qualities ... Talented managers are imperative for executing a vision and delivering

⁴ For more information, *The High-Impact Learning Organization: WhatWorks® in the Management, Operations, and Governance of Corporate Training*, Bersin & Associates, June 2005. Available to research members at www.elearningresearch.com or for purchase at www.bersin.com/highimpact.

⁵ Source: *Achieving Performance Results through Targeted Learning*, Informatica, October 2006.

results with efficiency, while maintaining strong team morale and company loyalty ... a “manager” is someone with a clearly defined role who works within a structured setting ... and drives a team to achieve desired, measured results. However, during times of change, stress, turmoil or strategic introspection, people with leadership qualities rise to the unique challenges of the environment and ... inspire others who seek guidance. Where a manager has a staff, leaders have followers ... Leadership is not a role, it is a quality...

The goals of the program were to ensure that all managers:

- Received consistent “best practices” to cultivate a common management culture and language;
- Received the same quality and timeliness of content delivery;
- Demonstrated mastery of core management “best practices” in six strategic competency areas; and,
- Provided additional best-practice knowledge to continuously enhance program content.⁶

With a clear understanding of the business needs and goals for each manager, the “Management Core Curriculum” program was developed. The following sections describe this program in more detail.

Competency-Based Curricula

As a first step, the vice president of human resources and the director of global HR learning and performance met with Informatica’s CEO to present the need for a foundational management development curricula. With its focus on teaching management best practices and its strong alignment to strategic goals, the CEO and the executive staff approved the proposal, and gave their support to proceed with the development and launch.

⁶ Source: *Achieving Performance Results through Targeted Learning*, Informatica, October 2006.

Next, the global HR team selected six core competencies that were aligned to corporate goals and business needs. The six core competencies formed the basis of the management core curricula, highlighting the best-practice behaviors of world-class managers:

- Developing direct reports;
- Coaching direct reports;
- Building effective teams;
- Hiring and staffing;
- Managing for results; and,
- Motivating others.

The vice president of human resources presented these six core competencies to senior management for endorsement; the director of global HR learning and performance clarified and gained senior management approval of the success metrics and criteria for program evaluation.

The Pfeifer Coaching Model (PCM)

After looking at various delivery options for the Management Core Curriculum (and based on scalability, goals, budget and business needs), the Pfeifer Coaching Model⁷ (PCM) was selected. This coach-based model provides a framework for the method of delivery that eliminated the need for classroom training – while increasing skills transfer⁸ and achieving higher levels of intrinsic motivation in managers toward newly learned skills. Plus, no matter where managers are located, they can receive the same quality and level of training.

The coaching model, although not a blended solution, is a hybrid of some of the qualities of both classroom training and coaching models

★ BEST PRACTICE

A company has to be very clear about how it characterizes a good leader in order to develop programs that will teach the necessary skills to be successful.

The coach-based model provides a framework for the method of delivery, eliminating the need for classroom training – while increasing skills transfer and intrinsic motivation in managers.

⁷ The “Pfeifer Coaching Model” was developed in 2004 by Linda Pfeifer, now director of global HR learning and performance at Informatica.

⁸ “Skills transfer” means the ability of the learner to take newly acquired skills back to his / her workplace and apply them in the day-to-day workflow.

Figure 1: Pfeifer Coaching Model



Source: Informatica, 2006.

– and is grounded in instructional design, coaching, transfer of training and intrinsic motivation theory⁹. (This is discussed in more detail in the section, “What Makes the Pfeifer Coaching Model Different?”.)

A key characteristic of PCM is to focus a course’s content on three (or no more than five) key skills or best practices within that competency¹⁰. For example, “Developing direct reports” is one competency. The three “foundational” best practices for this competency were identified and these form the basis of the course. For this example, one best practice could be the manager’s ability to “... coach his or her direct reports to create their own development plans, using the Informatica template to evaluate quality, timely implementation, relevance and effectiveness.”

As described in Figure 1, the first step in PCM is a one-hour assessment conducted by the coach to determine the participant’s current mastery of each best practice featured with the specific competency chosen by the manager. The goal of the PCM assessment is to customize the manager’s

A recent Bersin & Associates study showed that, on average, 67 percent of organizations that are very effective at driving business results, increasing the quality of their leadership pipeline and increasing overall employee retention use coaching always or most of the time.¹¹

⁹ “Intrinsic motivation” is when people engage in an activity for its own sake, without some obvious external incentive present.

¹⁰ Each course within this program is based on one of the six core competencies (as defined by Informatica). Within each course, three (but no more than five) best practices are learned, focusing on one best practice per coaching session. The program has been successfully completed when a manager has passed / gained accreditation in each of the six core competencies.

¹¹ This information is based on current research on the topic of leadership development, the report for which is due to be published in Summer 2007.

course to his / her background, expertise, challenges, management level and workplace. After the assessment session, the coach determines the manager's current skills gap for program mastery and customizes the course accordingly (see section, "Assessment").

The PCM delivery method can take between two and eight weeks to complete, though this timeframe is flexible and can be extended due to manager availability (e.g., vacations, illness, skills transfer timing and so on). In between coaching sessions, the manager applies newly learned skills (gained from each of the best practices on which he / she was coached) on the job. The model teaches and reinforces that the application of learning is just as important as the learning itself.

The program is motivational, applicable and relevant to all managers with different backgrounds. Everyone is doing the same best-practice behaviors but, based on an individual manager's role and management level, the coach ensures that the context in which the behaviors are applied is different.

The Pfeifer Coaching Model was quickly adopted and sponsored by Informatica's CEO, with the belief that it would contribute to the company's goal to become a benchmark for world-class management best practices – and that it would set the bar for managers at all management levels and geographies within the company. Following the CEO's sponsorship, the CFO and other C-level executives provided strong support. Examples of their support include participation in the Management Core Curriculum program, auditing program attendance reports and requiring their direct report managers to gain accreditation in at least two of the six competency-based courses each year.

All managers, regardless of their level or potential, are expected to gain accreditation in each of these six courses, including the CEO and his executive staff. The CEO distributed a companywide memo indicating that each manager is expected to receive accreditation in two of these six core competencies each year. Doing this sent a strong message throughout the company that learning is important.

★ BEST PRACTICE

There has to be a certain level of expectation from senior management, or leaders won't view the development process as a necessity for their career growth – or the growth of the company.

Coach-Based Model¹²

The coach-based model was compared to traditional classroom instruction to determine the effects of intrinsic motivation. The results showed higher levels of intrinsic motivation in those managers receiving the coach-based instruction, as well as high skills transfer ratings among the most complex skills. Traditional classroom instruction showed that pre-scores in motivation correlated with skills transfer ratings; in other words, high motivation pre-scores correlated to high skills transfer and low motivation pre-scores correlated to low skills transfer. But, this was not the case with the coach-based instruction.

The level of pre-scores in motivation did not matter with coach-based instruction – whether a manager scored high or low, he / she was still likely to transfer the skill. As a matter of fact, the intrinsic motivation levels were shown to increase throughout the coach-based program. Skills were transferred regardless of low (or high) motivation pre-scores. Hence, in the coach-based model there was no correlation between motivation and skills transfer (unlike classroom-based instruction). This is important because a lot of managers are not motivated to learn and apply new skills; therefore, the coach-based model offset the need for high motivation in managers as a prerequisite for skills transfer.

In other words, a coach can motivate a learner who may not initially be motivated in a one-on-one setting. With classroom-based training, a learner's pre-motivation level may influence skills transfer afterward. Hence, the Pfeifer Coaching Model is a valid alternative to traditional classroom-based instruction in the development of management soft skills.

What Makes the Pfeifer Coaching Model Different?

Traditional classroom-based training (or other forms of group learning) allows learners to share their knowledge, experiences and lessons learned – and provides opportunities for discussion among learners, as well as

The coached-based model offset the need for high pre-scores in motivation for managers as a prerequisite for skills transfer.

¹² Source: *A Comparison of the Effectiveness of Two Training Methodologies in the Development of Management Soft Skills*, Linda Pfeifer, Ed.D., University of San Francisco, UMI Proquest Information and Learning Company, 2004.

Figure 2: Traditional Training Versus the Pfeifer Coaching Model

Traditional Classroom Delivery	Pfeifer Coaching Model
Delivered at the same date / time at the same location to a group audience; same content delivered to different audiences.	Delivered at a date / time selected by the learner, via the telephone (in conjunction with Live Meeting, WebEx, email or similar technology for file sharing), with one-on-one discussions between coach and learner.
Same content delivered to the same group audience.	Content customized to the individual learner based on needs, skills and knowledge gap, current behavior, and background.
Multiple skills taught in a pre-set agenda.	Only three to five skills taught per course, and the learner can “test out ¹³ ” of one or all skills if competency is proven per skill criteria.
Completion is based on attendance (e.g., completion of a three-day course).	Completion is based on the proven competency in the skill criteria, as demonstrated by on-the-job transfer.
Group development.	One on one development.
Delivered face to face.	Delivered via telephone.
Inflexible, defined curriculum.	Flexible, adaptable, progressive.
Shared learning based on the people in the classroom at time of delivery.	Shared learning collected by the coach from each individual learner; these “learnings” are incorporated into the program to benefit others across geographies and other departments.

Source: Linda Pfeifer, Ed.D., 2007.

building relationships. However, with classroom-based training, the instructional designer, subject matter expert or facilitator controls or defines what skills are going to be learned in a given session. It is not unusual in a classroom setting for learners to have a range of expertise on the topics at hand. Learners ultimately go down the same path and have to put in the same amount of time irrespective of their backgrounds.

The Pfeifer Coaching Model offers a framework in which management coaching can be structured to accelerate results.

¹³ For the purposes of this case study, “test out” refers to the option given to a learner to prove proficiency of a best-practice skill during the assessment phase of the course.

Figure 3: Traditional Corporate Coaching Versus the Pfeifer Coaching Model

Traditional Corporate Coaching	Pfeifer Coaching Model
Primarily individual-driven.	Primarily organization-driven.
Often reactive; aligned to a problem.	Often proactive; establishes a global “bar” (benchmark) for best-practice skills.
May be delivered face to face, or via telephone or other medium.	Delivered via telephone (with supplemental file-sharing technology); not delivered face to face.
Not typically viewed as an alternative to classroom training for soft skills development.	Positioned as an alternative to classroom training for soft skills development.
May be delivered one on one or in a group coaching environment.	Delivered one on one.
Organization may establish desired outcomes with the coach, but the coach collaborates with the manager on content. Coach asks the manager, “What are your goals?”	Organization establishes desired outcomes; content is pre-set with three to five skills. Coach is responsible for ensuring learner competency in each skill per program criteria for on-the-job transfer.
Often leveraged as a followup to traditional training delivery or a group learning event.	May be offered as a standalone solution in replacement of traditional training delivery.
Evaluation strategy based on corporate client needs.	Evaluation strategy highly structured and embedded into the delivery model.

Source: Linda Pfeifer, Ed.D., 2007.

With traditional coaching, the coach typically:

- Assists the manager in setting goals;
- Guides the manager to look internally for answers to challenges; and,
- Helps the manager create momentum to move forward with his / her personal goals.

Figure 4: The Primary Role of a PCM Coach

The primary role of a PCM coach is to:

- Ensure that the manager transfers each skill (best practice) to the workplace at the level of each skill's success criteria;
- Increase the manager's intrinsic motivation toward each best practice;
- Continuously capture organizational learning that enhances program content; and,
- Confirm that the manager has proven his / her competency of skill criteria and achieved accreditation¹⁵.

Source: Linda Pfeifer, Ed.D., 2007.

In addition to this traditional coaching approach, both internal and external coaches may introduce a PCM-based coaching program as a complement to regular coaching, in which the behavioral changes and content (skills) are predetermined based on strategic organizational goals.

PCM requires that the organization be responsible for setting the direction and objectives of the management or leadership development program. The coach is responsible for assessing the mastery of skills of participating employees. Further, the coach is not expected to be a subject matter expert but, rather, an expert coach. The coach may not be fluent in content, but must be "content conversant" and trained in the field of coaching (i.e., how to motivate, create momentum and build a manager's self-efficacy during the learning process). Although Informatica uses only external coaches, PCM can be leveraged as a methodology for internal corporate coaches, as well.

For this coach-based model, another significant difference to classroom training delivery is that the coach can customize the one-on-one learning session according to the manager's individual skills level; this is not possible in a classroom setting. (See Figure 2 for a side-by-side comparison of traditional coaching and training versus PCM.)

¹⁴ This information is based on current research on the topic of leadership development, the report for which is due to be published in Summer 2007.

¹⁵ Source: *Achieving Performance Results through Targeted Learning*, Informatica, October 2006.

Sixty percent of organizations that have best-practice leadership development programs in place incorporate coaching as one aspect of their learning solution, versus only 30 percent of organizations that invest very little and have ineffective leadership programs.¹⁴

How Effective Is “Tele-Coaching”?

Another paradigm of the Pfeifer Coaching Model (versus more traditional coaching models) is that all of the coaching sessions are done remotely, referred to as “tele-coaching.” In this way, coaching is more cost-effective and enables Informatica to disseminate core curricula consistently and globally. Managers do not have to be living and working near headquarters to receive the same quality and content of training – all managers have the same access to this form of development.

When delivered in the framework of PCM, tele-coaching was found to be just as effective as face-to-face sessions –the coaching session does not have to be face to face for the coach and manager to build a rapport, acquire knowledge and transfer new skills (as long as the coach is experienced and trained in the PCM methodology). As a matter of fact, managers coached face to face are inclined to attribute their successes more to the coach; whereas, managers who receive coaching remotely tend to use language that demonstrates increased autonomy, self-efficacy and confidence.

Assessment

As illustrated earlier, this coaching-based model begins with a one-hour assessment, and every course delivers ideally three skills or best practices via one-on-one coaching sessions. The assessment is important because Informatica doesn't want to waste time on skills that a manager has already mastered. For example, the coach may recommend that the manager take a coaching session on each of the three best practices for a particular competency, or coaching sessions for only one or two of the competency's best practices; additionally, the coach may allow the manager to test out of the entire course (however, it is very rare for someone to test out of a course).

The Pfeifer Model and the Management Core Curriculum program are clearly defined. During the pre-assessment process, the coach works directly with the manager to define skills gaps, which allows the coach to customize or map the courses to a manager's background, providing very

Managers who have been coached “face to face” are inclined to attribute their successes more to their coaches; whereas, managers who receive coaching remotely tend to use language that demonstrates increased autonomy, self-efficacy and self-confidence.

Figure 5: Pfeifer Coaching Model: Assessment Cues

Knowledge	Does the learner possess knowledge of the skill with demonstrable proof of knowledge acquisition?
Transfer	Has the learner previously applied the skill at work with demonstrable proof of desired results?
Retention	Has extensive time lapsed since the learner applied the skill at work?
Acceleration	Does the learner lack the time to apply the skill now, such that the coach would accelerate skill use?
Quality	Is the learner applying old strategies for this skill and would benefit from new strategies / learnings provided in this program?
Organizational Learning	Can this learner offer new “best-practice” sharing regarding content improvement, insights and strategies for this skill that would benefit other learners and overall program content?

Source: Linda Pfeifer, 2007.

individualized and one-on-one development. This is not “one size fits all.” As described by the director of global HR learning and performance.

“Your report card is not about putting in the time to learn, it is about demonstrating skill transfer to the skill’s success criteria. If you have already mastered these best practices, you don’t spend time doing this program.”

Achieving accreditation in a program does not refer to mastery of the competency but, rather, mastery of the defined criteria for the three best practices for that competency – and for which the program was designed. There are defined criteria around what constitutes “mastery.” For example, as mentioned earlier, an example of a best practice for the competency “Developing direct reports” might be the manager’s ability to help his / her direct reports create development plans that are high quality, time-bound, relevant and measurable, as demonstrated by the use of Informatica’s development plan template. To determine mastery

of this best practice, the participating manager must provide the coach with the following:

- A completed development plan for one or more direct reports, based on Informatica's development plan template criteria;
- A description of the process that was used to create the plan;
- Feedback from the manager and the direct report on development plan criteria per template guidelines; and,
- Enhancement recommendations or validation from the manager as to best practice and / or job-aids provided during the course.

Also, it is important to understand that post-assessment occurs continuously as skills are transferred. Mastery of the best practices is demonstrated throughout the program and is evaluated by the coach immediately after initial transfer. The evaluation process uncovers the distinction between what a manager knows versus whether he / she has actually done it; the assessment of this distinction is accomplished through interviews with the manager. If a manager indicates that he / she has performed a specific skill or behavior, he / she must also offer examples (if applicable) and a list of colleagues who can be called on to confirm that they have observed or experienced this behavior of the manager (i.e., a direct report, peer or the manager's manager).

Further, a manager must not only demonstrate or validate that he / she is performing a skill, the coach needs to understand how well he / she performs that skill. Understandably, different managers will do things better or differently than others. This is taken into account and there is no "scale" of mastery; it is a "pass / no pass" assessment.

Characteristics of PCM

As described below, the following five characteristics make PCM unique.

1. **Course content is grounded in instructional design.** The foundation of a PCM program is based on specific skill and knowledge content that will enable managers to build proficiency toward a competency. The PCM program is prescriptive; the coaches are responsible for facilitating the learning and knowledge exploration process, and coaching these

With the Pfeifer Model, post-assessment occurs continuously as the best-practice skill transfer is demonstrated by the learner during program delivery and then evaluated by the coach.

skills with the managers. The difference is that the assessment piece enables the coach to customize the focus of the content for each individual manager.

2. **Tele-coaching facilitates learning progress with knowledge of intrinsic motivation theory.** Using experienced coaches who are able to coach, motivate, reinforce and build momentum with learners is a key success factor. Intrinsic motivation can be the most powerful form of motivation – and is when people engage in an activity for its own sake (without some obvious external incentive present). Managers are more likely to change behavior when they believe in the idea or feel that it aligns with their own values – as opposed to just a role-playing performance to get a passing grade. Furthermore, the managers have to believe that they can reach their desired goals based on the amount of effort they invest.
3. **Learning toward applied skill transfer is self-directed.** Each manager is responsible for applying the best practices that he / she has learned into his / her job and into the workplace. The manager decides when and how the new skill will be transferred to the workplace. He / she receives support from his / her own manager by way of performance development and as an incentive to master the best practices. This way, the process of learning and continuous learning becomes infused in the corporate culture.
4. **Spaced (versus mass) implementation of lessons aligned to skills transfer timing.** PCM provides opportunities for managers to learn in chunks, and apply their new knowledge and skills on the job – regularly and continuously – per their own calendars and convenience. This prevents the managers from becoming overwhelmed or losing the learning before they have an opportunity to apply it.
5. **Accreditation and knowledge management / organizational learning at completion.** One of the responsibilities of the manager and the coach is to capture knowledge and organizational learning. This can be as informal as a manager contacting the coach and saying, “I found interesting research on this topic” or “At my former employer, I used this process for implementing that best practice.” The program continuously evolves and matures, and is infused with new information, processes and examples that are discovered from prior sessions.

★ BEST PRACTICE

To ensure managers pursued accreditation, Informatica’s vice president of human resources established the completion of the Management Core Curriculum program as a prerequisite to promotion for select senior management positions.

★ BEST PRACTICE

Providing managers with opportunities to continuously apply new knowledge and skills increases the likelihood that learning will occur.

Measurements and Results

The value of the Management Core Curriculum program to managers and, in turn, to Informatica is measured by the success metrics to:

- Accelerate the learning process;
- Ensure high rates of skills transfer;
- Increase intrinsic motivation by a statistical significance;
- Ensure customization per manager, management level and / or geography;
- Maintain cost-effectiveness; and,
- Enhance manager effectiveness and team effectiveness.

Informatica has seen significant results from its Management Core Curriculum program through its application of the Pfeifer Coaching Model. A number of key measurements that indicate positive improvements in managers' skills levels and knowledge base, which have ultimately led to improved business performance, includes:

- A statistically significant increase in intrinsic motivation scores;
- 91 percent of managers changed their behaviors;
- 94 percent of managers said employees benefited as a result of their increased management effectiveness;
- 97 percent of managers said their individualized programs increased their confidence;
- On average, managers estimated a nine percent increase in effectiveness and a nine percent increase in their employees' effectiveness; and,
- Opportunity costs of \$1,840 per manager in savings over traditional classroom training, plus an estimated \$200 saved in logistics fees; ("opportunity" cost-savings were determined based upon the assumption that, in a traditional workshop format, the manager would be away from work for approximately one-and-one-half days versus only four hours with PCM).

PROGRAM PARTICIPANT TESTIMONIAL

"My program required me to talk to my employee and explore what motivated him – identify his unique motivators. And I discovered he was interested in career advancement, which he'd never shared with me before. Now I'm setting new goals for him."

PROGRAM PARTICIPANT TESTIMONIAL

"I began building on my employee's strengths instead of trying to make him something he wasn't. Now he's more productive – and we're both happier."

Figure 6: Kirkpatrick Model for Training Evaluation

Level 1	Reaction (Perception)	Learner’s reaction and perception of the pace, relevance, instructor, delivery and so on.
Level 2	Comprehension (Learning)	Testing, case studies, role plays, small group and one-on-one exercises.
Level 3	Application (Performance)	New skills applied in the workplace.
Level 4	ROI / Impact (Impact)	The value of the training program to the organization.

Source: Kirkpatrick, 1976.

These results were collected through both self-report surveys completed by accredited managers, as well as via one-on-one interviews in which examples of improved effectiveness, knowledge retention and skills transfer impact were collected.

When asked why “confidence” is important, the director of global HR learning and performance stated,

“Confidence is an important indicator of self-esteem and self-efficacy which, in turn, impact productivity ... A management development program that enhances confidence in managers will more likely result in managers who use new skills on the job and have higher self-efficacy.”

A management development program that enhances confidence in managers will more likely result in managers who use new skills on the job and have higher self-efficacy.

Influenced by the Kirkpatrick Model¹⁶, training evaluation strategies have been integrated into the flow of PCM, beginning with one-on-one assessments through customization of the content, and positive reinforcement and skills transfer throughout the program. Figure 6 shows the Kirkpatrick Model of training evaluation and Figure 7 shows how PCM maps to these levels – and also how it differs slightly in focus.

¹⁶ Donald Kirkpatrick’s four-level Measurement Model has been widely published in many articles and its terminology is well-known to most training professionals. The original model was published in *Training and Development Handbook*, R. L. Craig, McGraw-Hill, 1976.

Figure 7: Pfeifer Coaching Model – Evaluation as Influenced by Kirkpatrick

Level 1	Intrinsic Motivation (Reaction)	Intrinsic motivation inventory; knowledge and skills.
Level 2	Assessment and Comprehension (Learning)	One-on-one coach / learner assessment in first session; one-on-one knowledge delivery and exploration, discussion.
Level 3	Immediate Transfer (Performance)	Immediate skills transfer during spaced implementation.
Level 4	ROI / Impact (Impact)	Minimum two-month followup on impact.

Source: *Informatica, 2007.*

Levels 1 and 2 are evaluated by the coach throughout the program. The global HR learning and performance group administers Level 3 evaluations through interviews with the managers, as well as the managers’ managers and peers. These interviews are conducted (at a minimum of two months following the completion of a course) in order to give the manager time to demonstrate and transfer new skills and knowledge to the workplace.

At the highest level, the company attempts to measure return on investment (ROI) for the entire organization.

Lessons Learned

Through research and the implementation of the Pfeifer Coaching Model, the director of global HR learning and performance found that the most effective approach includes the following design requirements:

- Ideally, each course should focus on one competency and be limited to developing three skills or best practices;
- Each coaching session should last no more than one hour in order to keep the discussions focused and precise, as well as to maintain the efficiency of the process;

- One or more brief job-aids should be supplied to participants to help transfer the best practices on the job (these job-aids must be directly aligned to specific skills, be straightforward and easy to apply);
- Managers' action items for application and transfer of skills between sessions should be directly embedded in the manager's daily workflow;
- Delivery must be remote by telephone with file-sharing technology;
- Coaches should be knowledgeable in:
 - The Pfeifer Coaching Model, including assessment processes and instruments;
 - Instructional design theory;
 - Skills transfer theory;
 - Intrinsic motivation theory; and,
 - Knowledge management / organizational learning.

Another key lesson learned relates to the scenarios that the Pfeifer Coaching Model is most likely to be adopted by senior management. This Model is most successful under the following circumstances:

- Executive management has made it mandatory for all managers within a certain group to apply a set of best practice(s) on the job, and executive management recognizes the need to track best-practice trends and evolution proactively;
- Executive management requires that a set of best practice(s) be adopted consistently on a global level; and,
- Executive management has seen (or fears it will see) manager attrition increase over the past year in a certain function / department, and there is a strategic need to capture intellectual capital regarding best practices and tools / processes for implementation.

Best Practices of Informatica's Management Core Curriculum

As stated in a Bersin & Associates report, there are six best practices for high-impact leadership development.¹⁷ Informatica has demonstrated these best practices through the development, implementation and continuous improvement of its Management Core Curriculum program as follows.

1. **Strong Executive Engagement** – Establishing a learning and performance group was a key indicator of the prioritization of learning at Informatica. The expectation that all managers, including executives, achieve accreditation in the core management curricula further demonstrated senior management's support for development. Informatica HR business partners also worked with Informatica executives to establish program accreditation as prerequisites to management promotion.
2. **Tailored Leadership Competencies** – Informatica identified six core competencies that define a successful manager. Instructional designers have developed each course, so that these specific competencies are targeted. In other words, the Management Core Curriculum program “teaches to the competencies.”
3. **Business Strategy Alignment** – The rate of technology in data integration moves very rapidly and, for Informatica to grow, the company needs strong managers. The program is designed to create a “common language” of management and build best-practice skills sets of managers, which enable the company to manage and develop people efficiently.
4. **All Levels of Management** – Every manager, regardless of level, is expected to receive accreditation in the program. The curriculum is based on core management best practices and is customized for

¹⁷ For more information, *WhatWorks® in High-Impact Leadership Development: Essential Components, Best Practices and Case Studies*, Bersin & Associates / Kim Lamoureux, September 2006. Available to research members at www.elearningresearch.com.

each manager by the coach, who takes into account the manager's background, experience and job level.

5. **Comprehensive Learning Approach** – Informatica's learning model includes three types of learning – coaching, experience-based learning and relationship learning, as follows.
 - a. *Coaching* – Multiple, customized, one-on-one coaching sessions throughout the program, with as many as 18 sessions overall.
 - b. *Experience-Based Learning* – In-between coaching sessions, managers apply new skills and knowledge on the job. Action items are embedded in the manager's daily workflow to ensure opportunities for skills transfer.
 - c. *Organizational Learning* – Participants are encouraged to share knowledge, and coaches capture and disseminate organizational learning and best practices.
6. **Talent Management Integration** – The Management Core Curriculum program is integrated nicely with key components of talent management. Two examples include:
 - a. *Performance Management* – The six competencies addressed in the Management Core Curriculum program are included in Informatica's performance management process. Participating in the program is a common development objective captured in managers' development plans.
 - b. *Recruitment* – Hiring managers are strongly encouraged to complete the Management Core Curriculum's "Hiring and Staffing" course in order to effectively interview and select job candidates. The recruiting team and hiring managers are also trained to apply a competency-based interviewing approach, which includes the six core management competencies.

Conclusion

Informatica Corporation boldly embraced a novel learning model that eliminated the classroom, as well as other training mechanisms – and facilitated individualized learning and development through strictly

one-on-one remote coaching. The CEO and his executive staff strongly believed that this approach could lead them to become a benchmark for world-class management best practices.

In fact, Informatica has been able to take the Pfeifer Coaching Model and leverage it to accelerate the learning process of its managers to master core management skills, setting the bar for managers at all levels and geographies within the company. Informatica has done this in a way that is consistent, global and cost-effective. Regardless of location, managers receive the same quality and content of training.

Through this process, the company has also infused a culture for learning and a common language of management. By virtue of PCM, learning has been positioned as continuous development as opposed to a training event. Further, the coach-based model has provided a means for capturing the intellectual capital of top performers and organizational learning outcomes, which are disseminated back into the organization.

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