



# Methodology

This survey was conducted during the second half of 2014 through 34 one-to-one interviews with Learning & Development or Human Resources Managers from the following companies:

**FRANCE:** Alstom - BNP Paribas - Dassault Systèmes - Saint-Gobain - Total - Thales - Valeo - Vinci

**GERMANY:** Basf - Continental - Linde Material Handling - Osram - Wabco

**ITALY:** Avery Denison - Denso Thermal - Dolce & Gabbana - Ericsson - Gianni Versace - Pirelli - SAS Institute - Whirlpool

**SPAIN:** Acciona - Accor Hoteles - Gamesa - Iberia - Loewe

**SWITZERLAND:** Kuehne+Nagel - Richemont

**UNITED KINGDOM:** Aptar - Axa Technology Services - Bombardier - Mercer - RBS - Wolseley



## About the Cegos Group

Created in 1926, the Cegos Group is a worldwide leader in training and development. The Group now runs its own operations in 11 European, Asian and Latin American countries. It is also active in over 50 countries through its network of partners and distributors, which are all leading training providers and top-tier technology experts.

With 1,000 employees and more than 3,000 partner consultants, the Group trains 250,000 people around the globe every year and generates revenue of €200 million of which 40% is outside France and 10% across borders.

The group also offers, alone or in partnership with universities, 90 certificates or diploma courses.

Cegos offers global solutions, including off-the-shelf or bespoke learning solutions, coaching, international training projects & managed training services.

Its blended learning approach aims to provide the most suitable and competitive learner experience by combining: in-class or virtual class events, self-paced e-learning including mobile, on-the-job & social learning.

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## Today, Learning and Development (L&D) managers are facing four key challenges:

- ✦ Meeting business demand for committed workforce sharing best-in-class practices across countries
- ✦ Developing a genuine learning culture
- ✦ Building an effective L&D ecosystem by selecting the right technologies, organization, providers and content
- ✦ Keeping costs down and demonstrating business returns on training.

The current globalization of business is heightening these challenges more than ever before and driving more companies to internationalize their L&D function.

ATD's 2012 survey on training across borders suggests that at least 50% of companies are in this position.

**Cegos recently conducted a qualitative survey in 34 large international companies throughout Europe to gain a better understanding of how companies are meeting L&D challenges amid globalization.**

**This report explores the main findings from its interviews with HR or L&D managers in those companies. We also considered the experience that Cegos' teams have acquired through the 200 international training projects they deliver worldwide each year.**

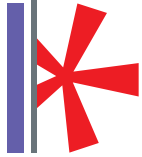
I would personally like to thank all the professionals who took the time to contribute to our survey in order to share their experience, stakes and practices. And I hope it will provide us all with useful strategies and food for thought.



**JOSÉ MONTES**

Chairman of the Cegos Group





# Corporate L&D transformation drivers

Now more than ever before,  
organizations need flexible workforces  
primed to adapt swiftly to evolving business  
strategies and new territories.

**Many organizations have grown beyond their national or regional home turf and their teams now need to work across borders.**

**Global L&D emerged around 15 years ago when companies opened corporate universities to train their senior leaders.** The main programs were thus focused on leadership and business management skills.

These corporate universities have now grown to encompass academies specializing in key central functions such as Purchasing, Finance, Project Management and Sales among others, and are now catering to managers and individual contributors throughout the company.

The first generation of Corporate Universities was geared to build a talent pipeline and a community of senior leaders able to map out and roll out the company's strategy across business units and geographies.

More recently, Corporate Universities' academies have started shifting towards harmonizing training solutions company-wide.

While expanding beyond their original target audiences (which in many cases grew six to eight times larger than the original groups of senior leaders), Corporate Universities started tackling various new challenges associated with international delivery such as:

✳ **The training solution range:** streamlining or downsizing the choice of training courses; localizing training programs to meet specific requirements in each region or country

✳ **Marketing and governance:** 'selling' corporate programs and establishing their Academies as the only authorized training channel across the organization

✳ **Administration:** simplifying training administration across countries (course localization, enrolment, session and participants management)

✳ **International providers:** selecting and managing one global partner, or working with several partners, to cover all geographies and languages

✳ **Costs:** going global without increasing budgets despite higher costs (translation and travel)

The two main factors driving this shift to 'One Group-wide Learning Center' today are:

# 1

## MEETING BUSINESS NEEDS AT CORPORATE AND LOCAL LEVELS:

- \* Becoming a genuine business partner
- \* More agile training ranges and processes
- \* Deepening cooperation between L&D teams across the organization

# 2

## IMPROVING L&D EFFECTIVENESS WITHOUT INCREASING TOTAL COSTS:

- \* Applying the 70/20/10 principle<sup>(1)</sup>
- \* Building robust and lean training solutions and infrastructure addressing 80% of training requirements at reasonable costs
- \* Effectively adopting online/virtual/digital/social learning
- \* Planning, budgeting and monitoring improvements



## Quotes from research

*“Over the past 15 years, we have organized corporate training. It was structured differently, the priorities were different, and implementation was less professional. Now, it is much more strategic, because it focuses on key strategic skills. It is much more visible as well.”*

*“Our company only started to turn into a multinational after a merger in 2009-2010. The need for a new way of managing people and HR became apparent.”*

*“Initially, we targeted the executive committee with a leadership training course. But, since then, we have started courses with middle management and we are now trickling these down to chief leaders and factory managers.”*

<sup>(1)</sup> Or '3ES' principle : the best learning mix is 70 % Experiencing / 20 % Exchanging / 10 % Educating



# The new Global L&D function's mission and duties

When discussing the new Global L&D function, respondents pointed out seven main missions and duties:

- ✦ **Fostering practice harmonization** across business units and countries
- ✦ **Building the new competencies** required by globalization
- ✦ **Deploying** corporate strategy and culture
- ✦ **Addressing issues** that cut across various business units
- ✦ **Boosting know-how transfer** due to fast development in new regions/countries
- ✦ **Harmonizing L&D solutions** to meet converging needs, such as cost optimization, standardization, (avoiding redundancy), new learning technology rollout
- ✦ **Managing L&D investment** at global level consistently with corporate and local business strategy and top priorities

## Quotes from research

*"I am responsible on a corporate level for executive training and overall practice harmonization."*

*"People who have identical or similar functions in different units should be interchangeable."*

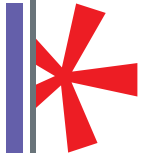
*"Globalization implies new skills, such as transversality and teamwork."*

*"We are in a period of change and we need to equip our personnel with new skills and competencies. It's the No.1 priority. The aim is to support the changes experienced by the company."*

*"The Group's globalization is a great challenge for us. We are trying to do the same thing in all the programs."*

*"We ensure the in-house coherence of messages, the way in which the training is conducted, its quality, etc. The aim is to optimize, and let's say 'capture' potential synergies in all these training courses."*

*"In order to get a total view and control on learning spend we need to stop allowing various regions or countries to manage budgets separately; we need one global budget. In some areas we have been able to do that; in others we are still working to align."*



# Corporate L&D organization & governance

Global L&D is usually organized by geography (regional campuses) and by field of expertise (academies or campuses specializing in Leadership, Personal Development, Sales, Finance, Purchasing, Manufacturing, etc.).

**Global L&D Governance primarily encompasses:**

- ✦ **Collaboration with Business lines and HR** to identify the skills gaps and plan relevant learning initiatives on time
- ✦ **Marketing the L&D solutions to the business units** across countries, and to employees and their managers
- ✦ **Managing the portfolio of L&D solutions:** defining new programs, selecting and managing providers, and continuously evaluating & improving the corporate learning process, practices and range
- ✦ **Managing the L&D network** across campuses and academies
- ✦ **And, in some cases, collecting and allocating budgets** across academies, programs and countries

**Our research suggests that L&D governance practices are becoming increasingly collaborative and that decision-making processes are becoming more interconnected. They now include:**

- ✦ All stakeholders (corporate and local, L&D and Business)
- ✦ Dedicated workshops or committees



## Quotes from research

*“We define the policies, procedures, methodologies, and then we work with local managers for regional adaptation.”*

*“The training solution is then tested, modified, improved and transmitted to the regions. They may adapt them, and implement a communication, marketing campaign. They then launch them in the appropriate manner.”*

*“The result of the first part of the process is presented to an academic council and a University rector council, where the directors from all the professions sit, which means that, from this first phase of data collection to the course’s design, there are contributions from business partners and senior management.”*



# Global L&D: International course portfolios and training methods

Corporate universities' original training portfolios were geared to Senior VPs and high-potentials, and therefore initially focused on leadership and management programs.

**Then they grew to encompass larger audiences and hence more topics, and the focus shifted to harmonizing practices across countries.** Training topics here include Sales, Customer Service, Projects, Finance, Purchasing, Human Resources, and Quality, Health, Safety and Environment.

These programs are often customized to the company's specific business, culture and organization.

**The last step in course portfolio globalization is 'Everybody's skills'**, namely Languages, Personal Effectiveness and Development, and Digital skills.

The goal, here, is much larger than fostering shared practices and collaboration. It also – and more importantly – involves improving training cost effectiveness by selecting best-in-class worldwide solutions and by slashing all the unnecessary courses that were previously available throughout the organization.

Many companies have downsized their training portfolio or are planning to do so. One of them recently cut the number of Personal Skills courses available to its employees throughout the world from roughly 1,700 to 12.



## Quotes from research

*“As a priority, these are roles which operate on an international level. Therefore, to summarize, those who are active on a worldwide level automatically join global training programs, especially in buying, selling, product engineering, marketing and finance functions.”*

*“Today, I think that things are changing a great deal. And, I'm reviewing strategy in order to have a relatively rich library in terms of off-the-shelf content and produce much shorter modules specific to our company. Because, 100% tailor-made solutions, customizations are all very well, but it takes a lot of time, it's a relatively heavy investment.”*





## Quotes from research

*“There is less and less face-to-face training. Even for what we do in management, there is a part which the participant has to prepare with computer tools.”*

*“We are moving increasingly towards mixed methods. It costs less and helps to overcome geographic obstacles.”*

*“It’s true that, today, travel costs are probably one of the main obstacles to the development of this type of training.”*

*“We are always going to look for partners who, on the basis of a module or something which they offer, are going to adapt to our needs.”*

In line with the overarching trend to shorten live events and focus on learning solutions that effectively impact workplace practices, international corporate programs are becoming increasingly blended, i.e. mixing face-to-face training with a set of self-paced online or on-the-job learning activities along with virtual classes and coaching.

This shift towards blended learning is driven by the 70/20/10 principle. This notion is not specific to international corporate programs but global L&D managers see several other benefits in blended learning:

- ✳ **Lower travel expenses and less time out** (both are usually higher on international programs than on local ones)
- ✳ **Better reach across scattered audiences** (countries or functions with smaller workforces)
- ✳ **Enhanced learning-content and delivery-method harmonization** (online learning solutions are usually the same across countries and languages)

**HARMONIZING COURSES ACROSS COUNTRIES AND GOING BLENDED DOES NOT MEAN THAT OFF-THE-SHELF COURSES INVARIABLY TAKE PRECEDENCE OVER CUSTOMIZED SOLUTIONS.**

✳ **Most respondents are keen on customized solutions for corporate programs in areas such as Leadership & Management, Finance, Sales, High Potentials and newcomer induction.**

This is logical since these programs typically target large, high-level audiences and the investment in customization is therefore worthwhile.

✳ **And they are keener on off-the-shelf solutions to build ‘everybody’s’ skills** (Personal Development, Digital, Languages) because these skills are very generic.



# Main challenges when shifting from multi-local to global L&D

Global L&D managers are facing the same challenges as most other L&D managers. That said, the challenges that Global L&D managers are dealing with are more specific and tougher, for several reasons:

✘ **Corporate L&D** is expected to contribute outstanding value: it needs to be more strategic, more business-driven and more innovative, but not cost more – or, ideally, have an even greater impact on business and cost less.

✘ **Going lean and pushing for standardization** – whatever the function or process – is always tough at corporate level.

✘ **Building a smart range of global L&D solutions** addressing widely diverse cultural and business environments is, in itself, complex.

✘ **The number of global training** providers with the qualified international teams and outstanding blended learning solutions to effectively support this shift is limited.

## **THE TOUGHEST ISSUES FOR GLOBAL L&D MANAGERS TODAY:**

✘ **Most respondents mention budget constraints** (which is consistent with the ATD Global L&D survey; see below)

✘ **Becoming a genuine global partner for business lines requires considerable change:**

- In some cases, L&D is seen as a commodity and business lines feel L&D people do not entirely understand business issues.

- Often, business line people are not fully available to plot out and roll out global programs together with L&D.

- Often, managers are not fully committed to developing their people.

- In many cases, ROI metrics to substantiate business value are deemed unrealistic and the other KPIs (pre/post 360° feedback, Kirkpatrick level 3, etc.) are still difficult to implement at global level.

✘ **Finding and selecting genuinely global training partners is not easy.**

✘ **Often, global L&D governance principles and leadership are not clearly established:** most branches and countries still have a great deal of headroom to decide on their L&D investment and whether or not to use corporate training portfolios

✘ **Discussions with L&D managers revealed a surprising lack of clear-cut Global L&D governance rules.** This also emerged in ATD's Global L&D" Survey: "Only 49 percent of organizations have a senior leader running the training functions and fewer than 45 percent have a written business plan for learning"

## Quotes from research

*“Obstacles have appeared over the years with cost problems because, naturally, when you do this type of training, you have to get quite a lot of people to travel around the world, and, therefore, that generates costs.”*

*“We have some great things, but we don’t always know how to sell them in-house.”*

*“I think that we must be lacking proximity with the branches’ business problems.”*

*“Sometimes, we invest a great deal of time and resources in training which is not communicated well or in which managers are not properly involved with regards to their leadership.”*

*“The positioning of the Learning function should be reviewed too because I think it should be seen as a business in its own right and not just as a simple service.”*

*“Countries want service providers who are based locally and are 100% trustworthy. My problem is to recommend the right one whereas I am not the decision maker about the budget.”*

*“We are increasingly looking for worldwide partners. It makes the deployment of our international programs easier. Increasingly, we work with partners which offer their services here, but also in all the countries where we are present.”*

*“It’s true that our university is partly from western countries and remains relatively expensive, especially owing to the problem of finding trainers in these countries who may be more suitable but who may also be less expensive. We haven’t invested what we needed to for that. Therefore, it continues to be seen as a very western university and not a very global one in terms of origin.”*

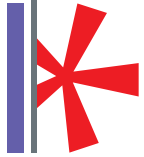
### THE ATD SURVEY RANKED FACTORS THAT HINDER GLOBAL LEARNING WHICH MATCH WITH OUR RETURN ON EXPERIENCE<sup>(2)</sup>.

Question : « *To what extent do the following factors hinder your organization’s ability to address learning in global operations ?* »

Answers (very high extent + high extent):

1. Insufficient staff to conduct training
2. Budgetary constraints
3. Travel
4. Difficulties integrating organizational systems
5. Learning function not involved early enough in expansion
6. Insufficient in-house skills to conduct training
7. Learning management system not flexible enough
8. Technical connectivity problems

<sup>(2)</sup> The GLOBAL WORKPLACE: Learning Beyond Borders 2012, Copyright American Society for Training & Development, 2012.



## Conclusion

Working with global providers to build a robust global learning ecosystem based on best-in-class content and deployed using relevant technologies, is the key to meet people development challenges in a globalized world.

HR and L&D professionals who succeed in optimizing learning and development practices and in reducing costs, **by leveraging the full potential in blended learning**, can massively increase the value they are bringing to business.

Alongside enhanced organizational agility, employee commitment and performance will increase, and the organization will be in a better position **to fill the skills gaps swiftly while attracting the best new talent worldwide.**

Building this 'One' corporate L&D is undoubtedly one of the biggest challenges L&D managers have ever faced. However, the rewards of smart L&D globalization stretch way beyond economies of scale. Furthermore, content clarity and consistency will feed a unified corporate brand and culture, and create an adaptable organization fit **to compete and prosper in a global and digital marketplace.**



## Quotes from research

*“The good levers are to make tools which serve the business, namely to have about forty learning actions which are presented to the Executive Committee and all of the group’s directors at least once a year, therefore, to root training in business realities.”*

*“On an international level, I think that the important thing is to know how to adapt to the culture of the place where you are going. We have to work with very global things and with very specific content which does not offend the trainees’ sensitivities.”*

*“The challenge is to ensure that people work in a network. We are a global group with a presence in five continents, either subsidiaries set up on-site, subsidiaries acquired, shareholdings, partnerships. All of this has to be coordinated. We have to agree with each other. Understand each other. The same applies to all functions, but our role in L&D is cross-cutting and, therefore, we play a pivotal role and have increasing responsibility.”*

*“I am waiting for a large supplier which provides me with an example of good external practices, who says to me ‘I’ve worked for this company and although the context is different, this is what worked’, in such a way that my reference point is practices which have been successful in other companies.”*

# 20 key findings to make your L&D function more global and cost-effective

## BUILD AND LEAD A GLOBAL L&D ECO SYSTEM ENABLING BUSINESS, L&D AND PARTNERS TO COLLABORATE EFFECTIVELY

1.

**Build a three-year L&D roadmap highlighting the strategic goals** (key contributions to business and the main improvements in L&D performance)

2.

**Do not wait for ROI metrics to demonstrate the value that L&D is bringing to business:** Report at Management Committee level, every year on roadmap progress and every quarter on robust and timely KPIs (Kirkpatrick Level 1, 2, 3 evaluations, L&D efficiency, business satisfaction index)

3.

**Organize L&D as a decentralized virtual network** sharing core process and team-working on corporate programs on a daily basis

4.

**Think global, learn local:** training delivery by local/regional trainers will often be more cost-effective, and always be easier to accept, than delivery by corporate trainers

5.

**Select long-term preferred training partners,** typically one to three in each field of expertise at global level

6.

**Nurture learning culture by offering self-paced learning solutions and by making each employee/team proud of his/her personal and team achievements.** Leverage technology to make learning easier and friendlier ('My Learning Portal')

7.

**Do not expect your LMS to make blended learning happen by itself**

8.

**Make sure your L&D people are seen as trusted advisors** regarding business, cultural issues, best-in-class learning solutions, learning-technology on-boarding, and levers to optimize L&D costs and performance

**THIS RESEARCH AND OUR EXPERIENCE SUPPORTING GLOBAL L&D MANAGERS SHED LIGHT ON THE KEYS TO SHAPE YOUR L&D FUNCTION AROUND THE NEEDS OF THE 2020 WORKPLACE, WHICH WILL BE:**

### \* MORE GLOBAL,

to have the right talent in the right countries at any time, and to nurture 'One company DNA'

### \* MORE ATTRACTIVE,

because corporate solutions need to be best-in-class and Generation Y is more demanding

### \* MORE AGILE,

because businesses, organizations and technologies are moving faster than ever

## BUILD AND MARKET AN ATTRACTIVE LEARNING AND DEVELOPMENT PORTFOLIO

### 9.

**Avoid overly US/EU-centric training:** even if your corporate course portfolios are harmonized across countries, adapt them to each 'market':

- Think about fill rates: a portfolio of 15 Face to Face courses dealing with personal development skills can work well in countries that have large headcounts but not in smaller ones (where 5 Virtual Instructor Led Training courses could be the right option)
- Think about local cultural and business specifics

### 10.

**Anticipate Gen-Y preference for short, multi-device, collaborative learning**

### 11.

**Brand your L&D portfolio as a business and corporate culture enabler:**

- The key notions here are: engaging learner experiences, transfer to the workplace, cost- and time-effective, and fun
- Find ways to speak directly to learners and their managers, business leaders and HR
- 'My Learning Portal' is the key marketing channel: make sure it is user-friendly and conveys your brand image

### 12.

**In order to position Global L&D as an innovative business enabler, start with international training for change-related programs** such as the introduction of a new sales model across countries (See the Coface case study at the end of the document)

### 13.

**Organize cross-country word-of-mouth marketing through simple KPIs** ('Likes' or Net Promoter Score or Achievement index) published on 'My Learning Portal'

### 14.

**Continuously optimize your training offering based on feedbacks and fill rates**

## SELECT LONG-TERM TRAINING PARTNERS

**You need more than a training provider: you need a solid international partner that can share insightful advice, and challenge and benchmark your L&D process and portfolio.**

### 15.

**With a 'GloCal' project team that has extensive experience collaborating on international projects, and:**

- Shares robust project management process and tools (quality, learner feedback, invoicing, etc.) – plus the members know each other well
- Is fully committed to building a strong relationship with your company both at Corporate level and in each country, and will act as a 'go-between' when needs be

### 16.

**With certified trainers in most of your host countries**

### 17.

**With proven multimodal delivery capabilities worldwide**

### 18.

**Ready to bring valuable innovation and benchmarks into your L&D ecosystem,** including mobile devices, virtual classes, stimulating solutions to foster transfer to the workplace, free curated contents, MOOCs, etc.

### 19.

**Willing to invest in building close ties between its trainers and your organization, and in understanding your business challenges and values**

### 20.

**Able to pool service delivery with other companies**

# Cegos' experience supporting global L&D

## ADDED VALUE 1: A PORTFOLIO OF PERSONAL SKILLS COURSES AVAILABLE EVERYWHERE

- Easily catering to each employee's training needs across countries via a single provider active in each country, using the right portfolio
- Providing effective training thanks to world-class courses delivered by local trainers
- Fostering cross-country collaboration thanks to shared personal skills

## AIRBUS GROUP LEARNING CENTER

Personal Skills (25 courses)  
Europe, 4 countries (to be extended to others)  
12,000+ delegates over 3 years  
60 trainers in 4 countries

## ADDED VALUE 2: TRAINING CURRICULUM DELIVERED GLOBALLY

- Relying on a unique provider to take care of a global program from A to Z (design/customization, country onboarding, training delivery, project management, central or local invoicing)
- Fostering effective learning with customized content delivered by local trainers sharing best-in-class facilitation methods
- Deploying 'One Company' practices across countries

## FAURECIA UNIVERSITY

Management (3 curricula)  
World, 20 countries  
1,000+ delegates over 6 years  
30 trainers in 20 countries

## HITACHI CONSTRUCTION & MACHINERY (APAC)

Sales (2 blended learning curricula)  
World, 3 regional hubs  
400+ delegates over 2 years  
12 trainers in 3 hubs

*"From my personal experience, Cegos trainers are terrifically engaging, knowledgeable and inspiring master facilitators and sales coaches. The proposed approach to personalizing sales, business development and relationship building activities paired with the easy-to-digest and contemporary, practical and highly workable solutions, has resonated well with our sales teams whose success is reliant on establishing trust with their clients and future business partners."*

**Simon Poh** Managing Director Hitachi Construction & Machinery Asia Pacific

## ADDED VALUE 3: BOOST AND SECURE THE DEPLOYMENT OF A CORPORATE INITIATIVE

- Fostering adoption of a new sales model and sales roles
- Boosting sales performance indicators within 6 months

## COFACE - GROUP COMMERCIAL SALES OPERATIONS

Sales (3 blended learning curricula)  
World, 35 countries  
900+ delegates within 10 weeks  
26 trainers and 14 languages

*"In the context of increased competition in our market, we were delighted that our 2014 results showed solid customer retention and that the number of new contracts signed increased significantly year-on-year. We would like this initiative to continue over time, to become one of the pillars of change management support for our teams."*

**Joëlle Attal-Molere** Group Commercial Sales Operations Director

# Worldwide operations

Cegos started expanding internationally in the 1950s and now runs its own operations in 11 European, Asian and Latin American countries. It is also active in over 50 countries through its network of partners and distributors, which are all leading training providers and top-tier technology experts.

## The Cegos Group

China \* Czech Republic  
France \* Germany  
Italy \* Latin America  
Portugal \* Singapore  
Spain \* Switzerland  
United Kingdom

## Cegos' principal partners

### Europe

Hungary, the Netherlands, Romania, Slovakia, etc.

### Africa & Middle-East

Algeria, Cameroon, Côte d'Ivoire, Egypt, South Africa, United Arab Emirates, etc.

### Asia-Pacific

Australia, Hong Kong, India, the Philippines, Thailand, Vietnam, etc.

### Americas

Canada, Colombia, the United States, Mexico, etc.



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BEYOND KNOWLEDGE\*