In which direction is your globalization pendulum swinging? The Future Search Conference has some answers.

Globalization continues to be a dominant and recurring theme among training and HRD professionals, but what does it mean to the training and development function when an organization changes its global focus? That's one of the key questions that emerged from the Future Search Conference in Orlando, Florida, last June, when 64 HRD business leaders, practitioners, and scholars from around the world met to explore the future of the profession.

Three overriding trends dominated the discussion:

● increasing effects of globalization and diversity in the workplace
● increasing demand for just-in-time learning
● increasing shareholder pressure for short-term profits.

THE GLOBAL PENDULUM

By Laura L. Bierema

John W. Bing

and Terry J. Carter

After the conference, we spoke with a number of globally savvy professionals to learn what companies are doing to meet the challenges of training and development in a global economy. To our surprise, we discovered that the globalization pendulum swings to create unique positions in the marketplace and that education about diversity is more diverse than ever.

How t&d supports globalization

The concept of globalization is controversial, and disagreement simmers over definitions. We define globalization as the crossing of financial, technical, and cultural boundaries to facilitate a global flow of goods, information, and services. Terminology aside, many companies have developed a global presence in the past two decades through technological advances and eroding trade barriers. Among the positive effects of globalization is a focus on improving communication among employees from diverse backgrounds and countries. There's growing recognition that a positive relationship exists between cross-cultural communications and effective teamwork and productivity. Training and development professionals can play an important role in sustaining that relationship.

In supporting international operations of a company, the *d* in t&d is more important than the *t,* according to the evidence. Many companies use relocation training to prepare employees for international markets and expatriates for overseas service. Developing talent is a major goal of training and development.

Frank Smith, vice president of global organizational development and training at Wyeth Ayerst Pharmaceuticals, says that the war for talent requires more than simple expatriation training.

"A big payoff of globalization is the capacity to gather the best talent from anywhere to work on your biggest problems," says Smith. "T&d in support of that goal must identify, assess, select, and develop people who are capable of working anywhere."

The war for global talent is at the highest technical and managerial levels. Consequently, training budgets are often channeled towards grooming tal-ented employees for international work—with the expectation that such training and advancement opportunities will increase retention. Our evidence suggests that many companies have invested in two strategically critical areas of development for executive and managerial talent: supporting global leadership programs and developing global teams.

Global leadership programs. What are organizations doing to enhance global t&d efforts for leaders? In Europe, it's common for business leaders to have lived, studied, and worked in many countries. In the United States, fewer top leaders have international experience or speak multiple languages, so their capacity for global leadership must be developed. T&d approaches typically emphasize the development of cross-cultural skills that are effective across borders, creation or revision of training materials to be more international in scope, and development of global leadership capabilities. Strategic thinking is key. Many global leaders find that they're constantly reevaluating their companies' strategic positions along a pendulum that swings from a regional focus to a global one, as dictated by business need.

Bill Gardner, director of corporate growth and development for Advanced Micro Devices, emphasizes that his firm, a major microprocessor manufacturer based in Pennsylvania, has a new global business-unit initiative requiring staff who can work anywhere in AMD's world. That initiative has sparked a global leadership and development effort at AMD.

"We created a new group, the Global Leadership Advisory Council, which represents every learning and development group in the company," says Gardner. "That group is charged with finding ways to develop leaders and then deliver them worldwide."

Gardner believes that as a result of that effort, "We will begin to have more coordination and thinking from a global perspective than in the past."

Boeing also integrates globalization components into many of its training programs. Mary Mannion Plunkett, senior manager of research and evaluation, describes a global leadership program that's held two to four times a year to provide top managers with a three-week, in-country action learning experience of culture and business information exchange. The program includes focused educational components

and action learning applications groups for Boeing executives in a target country.

In another example, a large U.S.-based health-care firm recently expanded its domestic leadership program to cover Asia, Latin America, and Europe. The program was extensively rewritten for Europe so that U.S. models of leadership weren't the only ones used.

We also talked with Renee Rogers, vice president of human resources for Sulzer Orthopedics, a Swiss company with extensive operations in the United States. She says that Sulzer recently developed a leadership model to take advantage of the significant difference in leadership styles between U.S. and Swiss management. Sulzer calls it the STAR leadership model: strategy, team development, alignment, and results orientation. Rogers notes that Swiss leaders tend to focus on team development and alignment; U.S. leaders traditionally focus on strategy and results.

"It was a good match if you brought everyone together," says Rogers, "because it allowed Swiss and U.S. leaders to understand how their combined strengths, if aligned, could produce better results for the company."

Sulzer Orthopedics is a good example of a global company that has deliberately assumed a more regional position along the global continuum, especially in training and development. Sulzer changed its slogan from "Think globally, act locally" (a term

TOP THREE TRENDS

These trends emerged on top at the ASTD/AHRD 2001 Future Search Conference, Shaping the Future: Leading Workplace Learning and Performance in the New Millennium, held June 2001.

1. Increasing Effects of Globalization and Diversity in the Workplace (in this article)

2. Increasing Demand for a Just-in-Time Workplace (coming in June)

3. Increasing Stakeholder Pressure for Short-Term Profits (coming in July)

coined by Marvin Weisbord and used as a guiding principle in Future Search Conferences) to, "Be as regional as possible, as global as necessary."

Rogers sees globalization and regionalism as opposite ends of a continuum or directions of a pendulum, noting that companies tend to swing back and forth between a regional focus and a global focus as they respond to changes in the marketplace.

The bottom line: For global companies based anywhere, the development of leaders capable of leading around the world is critical to success. The pendulum swings, however, between local training versus global training to meet business needs. The role of t&d in global leadership programs must be to create specific initiatives to support strategic goals.

Global team support. As little as 10 to 15 years ago, global teams were rare. Now, in many industries they're the linchpin of critical activities in research and development, marketing, operations, and management. Global teams are expensive to create, develop, and maintain. Therefore, they operate in high-margin areas of specific industries, such as drug-development teams in the pharmaceutical business. Many companies invest in travel, communications support, team support, assessment, and development to enhance global team productivity.

One global pharmaceutical company uses a special assessment program with global teams. The quarterly

"Be as regional as possible, as global as necessary."

THE FUTURE SEARCH CONFERENCE

Future Search is a unique planning conference that has been used by hundreds of organizations and communities to help diverse groups discover values, purposes, and projects that they hold in common to create a desired vision of the future and plan implementation. Since first described by Marvin Weisbord in *Productive Workplaces* (Jossey-Bass, 1987), Weisbord and his collaborator and colleague Sandra Janoff have pioneered the use of Future Search Conferences all over the world to stimulate strategic change. Their new book is

◁») *Future Search: An Action Guide to Finding Common Ground in Organizations and Communities* (2nd edition, Berrett-Koehler, 2000)

Future Search is based on these principles:

● Get a cross-section of the whole system into one room.

● Explore the whole before seeking to act on any part.

● Focus on common ground and desired futures, and treat problems and conflicts as information, not action items.

● Self-manage work, and take responsibility for action.

The purpose of the Future Search Conference was to map the future for workplace learning and shape the roles of training and development professionals to lead changes occurring in the field.

Sixty-four leaders in business organizations, academic institutions, and government agencies were invited by ASTD's Research-to-Practice Committee to participate in this first Future Search Conference ever to inform a profession, in Orlando, in June 2001, just prior to the annual ASTD International Conference.

GO TO WWW.ASTD.ORG/VIRTUAL_COMMUNITY/FUTURESEARCH for a summary of the conference and photos. Also, ◁») **www.futuresearch.net** to learn more about this method for helping people act together across boundaries of geography, language, culture, class, gender, race, and age.

assessment measures team performance over time and compares it with other company and development teams. The teams and management use the assessment to identify support and development issues. The assessment is also used to coach team leaders as they develop leadership capacity. The assessment questionnaire is Web-based, making results available almost instantly for use by team members. T&d can perform a critical support role by developing a consistent, effective, research-based approach to global-team assessment and management across a functional area, a division, or the entire company. Naturally, any assessment used should be as culture-neutral as possible and must provide comparative progress of teams engaged in similar work.

AMD has an Internet-based course on virtual teams—an example of a virtual team using a virtual training course—but that doesn't eliminate the need for occasional face-to-face interaction. AMD's Gardner says, "We are a high-tech and high-touch company. Therefore, even if the work of global teams will be primarily virtual, we usually start with a face-to-face meeting."

Because every industry is different, the kind of support needed by virtual teams varies. For example, drug-development teams can take many years to bring a new drug to market, but teams working in the field of information technology can develop a new application in a matter of months. The electronic age promises an increased use of virtual teams and raises important t&d issues, including virtual facilitation, innovation, teambuilding, employee development, conflict resolution, and diversity awareness.

Hamish Petrie, vice president for people and communications at Alcoa, describes a multiregional team structure that clearly links the need for leadership development with team development: "We see a real need to redevelop our leaders so that they have a clear model for leading global businesses…. We're heading to a multiregional team structure and need to provide more support and training for these lead teams [so they] really understand how to operate in a global context."

The bottom line: Supporting global teams is a way to support the business strategy of the company. That process is increasingly becoming virtual, focused on assessment and development.

Globalization and diversity training: Are they related?

How does a global agenda relate to an organization's diversity efforts? Like trying to define globalization, defining diversity is difficult. To some people, such as Virginia Gonzalez, professor of counseling at Northampton Community College in Bethlehem, Pennsylvania, diversity is a social justice issue designed to counteract the effects of discrimination. That view implies that equal opportunities should be given to all people regardless of race, creed, color, gender, national origin, or sexual orientation, as established by Equal Employment Opportunity and Civil Rights laws in the United States. That perspective deals specifically with the impact of oppression on people's lives and seeks to restructure power relations in the workplace. In contrast, Gonzalez notes, a global view of diversity includes of many countries…[with] different languages and traditions, so there is more experience in dealing with multiculturalism than in the States." He's concerned that many U.S. companies approach globalization by disseminating the American-led diversity agenda that's more appropriate in the United States. Martin thinks that from a European point of view, many companies have compromised multicultural issues.

AMD's Gardner agrees. He views diversity as an America-centric concept that doesn't travel well. As American companies expand globally, some may be in danger of trying to globalize the American concept of diversity in ways that will seem inappropriate to host cultures. Gardner says that diversity training at AMD has more of an organization development flavor and is based on surfacing cultural distinctions and learning to bridge differences towards relationship-building to ensure effectiveness, productivity, and profitability.

Diversity issues exist in every country, but aren't the same everywhere.

a multicultural perspective that focuses on cultural differences among people who are generally considered to be equals.

We found that many organizations do perceive a need to maintain that distinction. Stephen Martin, managing director of Kimball Consulting Ltd./ITAP Europe, says the problem is one of perception as well as location.

"From my side of the Atlantic and the European community, there's a significant difference between diversity and multiculturalism," says Martin. He views the diversity agenda (which he thinks has an American origin) as having two goals: 1) identifying differences and 2) ensuring equal opportunity in spite of differences.

"The cross-cultural agenda in Europe is quite different," says Martin. "The European Union consists

The challenge for global leaders, according to Sulzer VP Rogers, is to learn from international experiences in other cultures. "Training's role can be to help leaders reflect on their experiences and to challenge the ways in which they view and interpret those experiences to overcome ethnocentrism," she says.

Smith of Wyeth-Ayerst Pharmaceuticals says, "Diversity for me in the 1990s was about two key constructs: issues of voice and inclusion, regardless of culture or country." Smith's challenge is, "How do we give employees voice on a global basis regardless of where they are? And how do we create inclusive environments?"

The bottom line: Diversity issues exist in every country, but aren't the same everywhere. The cross-cultural agenda (also referred to as multiculturalism) works to align people from various parts of the

WHAT TO DO

● Support the mobility of global talent by preparing leaders with the learning they need.
● Create training materials that have global examples.
● Recognize different leadership styles based on country, and educate managers about cultural differences.
● Integrate global issues into local training programs.
● Provide virtual assessment support to individuals and teams.
● Promote different voices and inclusion in training.
● Explore a wide range of diversity issues to include a multicultural perspective.

world across countries and cultures. U.S. companies may be more sensitive to ethnic and racial diversity issues; European diversity is often based on nationality and ethnicity. Understanding the different perspectives about diversity can help make diversity initiatives more context-specific.

Responding to a changed world

Recent world events have triggered reflection on the role of HRD. Based on our interviews, we conclude that although the events of September 11 took a significant emotional toll, training and development hasn't significantly changed.

The HRD and training field has yet to address many areas of concern that emerged from last June's Future Search Conference. Those areas include broad problems—such as learning and performance challenges—associated with globalization, environmental destruction, and worker equity. We find that many people in the field are taking a short-term, reactive stance—often in response to short-term organizational pressure for profitability. But the future is open

to more challenging, long-term solutions for HRD and training professionals to reshape their role in supporting the long-term health of their organizations and the social and ecological environments in which they operate.

Increased reliance on Web-based training. Although training and development approaches aren't predicted to change radically in the short term, delivery methods, procedures, and venues for training are already adjusting. Martin of Kimball Consulting sees increasing use of Web-based content for training delivery as companies, for safety and financial reasons, seek to decrease face-to-face training and development. Most of the organizations we interviewed intend to continue exploring Web-based training delivery mechanisms to meet global training needs.

Changing delivery strategies. Bill Withers, organizational development manager of AMD, says that 9-11 isn't likely to change the way AMD employees work, but it did increase the need for culturally sensitive communications to and among employees. AMD's October 2001 training courses ran as scheduled, but the company security staff brought in local police and fire officials to provide education about terrorism.

The bottom line: Training and development haven't changed radically in response to world events. The question is, Should it? If so, how? Those are fundamental issues to consider, in addition to the ongoing need for more culturally sensitive and safety-based training. Trainers must be aware that moving training to the Web may not solve issues of intolerance, misunderstanding, and work style that tend to be inherent in a diverse and global workforce.

Maintaining value. As HRD and training professionals learn to respond to a changed world, they must move beyond simple adjustments to delivery methods, procedures, and venues to consider how they'll deliver value on local and global levels to multiple and sometimes conflicting stakeholders.

Sandra Quesada, vice president of Learning Systems USA, notes that where a training effort is initiated and rolled out depends on where it adds value to the organization—whether it delivers value to local, regional, or global constituencies, or some combination. That value orientation helps "avoid duplication and promote replication," she says.

For example, training to support a manufacturing process in a global pharmaceutical business will generally be designed and developed at corporate headquarters and rolled out globally for consistency. But sales training on a product due for delivery in France will usually be developed and delivered there, unless France is only the first point in a European-wide rollout. In that case, a regional design might be more appropriate.

Sulzer's new regional, decentralized organization structure was solidified and justified after the events of September 11. Rogers says, "I think most training at Sulzer will continue to be a local concern." She also thinks that the organization's senior leaders need global training to learn experientially. Alcoa's Petrie says that as a result of globalization, the "dominant accountability for training was decentralized to our business units…. Our corporate program was downsized because of that shift in accountability. We increased the representation of international attendees in our remaining corporate programs and conducted some of them outside of the United States."

The bottom line: The training and development function must consider how to avoid duplication and promote replication as it considers where to locate and roll out programs. It must also consider what delivery methods are most effective and how to position them—locally, regionally, or globally. Those are fundamental issues of value, made more demanding in the global environment.

As the pendulum swings

Eugene Field, a 19th-century American poet and journalist, wrote, "Human thought is like a monstrous pendulum; it keeps swinging from one extreme to the other." So it is with the complex issues of globalization resulting from changes in economics, politics, world events, and cultural perspectives.

The globalization pendulum appears to be swinging back and forth rapidly as organizations adopt local and global perspectives of training, development, learning, and performance. As practitioners face an ever-more complex, unpredictable, and sometimes dangerous world, it's important to reflect on their roles, their stakeholders, and the purposes of their work.

Our interviews indicate that the t&d profession will continue to support organizational goals in a global economy by determining the value added

COMMON GROUND

Here are some statements from the Future Search Conference on efforts in common:

- creating synergy between research and practice
- leveraging technology without losing the human touch and social component of learning
- striking balance between work life and personal life
- creating humane workplaces worldwide
- recognizing intellectual capital as the lifeblood of the organization (the true bottom line)
- developing a sense of social responsibility
- embracing globalization and multiculturalism
- partnering in the fundamentally changing role of education
- managing knowledge and learning effectively
- developing partnerships and collaboration internal and external to the organization
- fostering lifelong learning.

and where global projects are best located and developed. Web-based content is increasing, and the design and delivery of Web-based e-learning appears to be largely centralized. Still, most training and development functions recognize that there'll always be a need for face-to-face interaction to build the relationships that business depends on in a global economy. Many global companies focus on developing talent at senior levels, and some have developed global councils to promote leadership development.

As organizations customize their products to the individual customer on a global basis, organizational sensitivity to diversity issues and multicultural perspectives must increase proportionally. The

swing to become a more global company provides an opportunity to put diversity and multicultural perspectives front and center. In an increasingly global milieu, diversity efforts are likely to include a multicultural agenda. It's important to recognize, however, that U.S. and international perspectives differ considerably on the meaning of diversity. Trainers need to be especially sensitive to the context in which they use the term and how they design and deliver various training and development programs.

This could be the profession's critical moment to evaluate what it should be doing to move forward. The Future Search Conference attendees in Orlando, many of them HRD people, see the role of professionals in the field as strategic partners to help companies manage knowledge and learning effectively to achieve business goals. Supporting globalization through training and development represents one such effort. We have an opportunity to encourage the creation of collaborative relationships to foster international understanding and respect for differences in a multicultural world.

In that way, HRD and workplace learning and performance professionals can support their organization's capacity to move beyond quarterly financial statements to create humane workplaces and maximize the value of technology, without losing the human touch and social elements of learning. **T**D

Laura L. Bierema *is an assistant professor at the University of Georgia, Department of Adult Education, Program in Human Resource and Organization Development; lbierema@coe.uga.edu.* **John W. Bing** *is president of ITAP International, a consulting firm operating from Princeton, New Jersey, with branches in Europe and Asia; jbing@itapintl.com.* **Terry J. Carter** *is president of Executive Learning Strategies, a management consulting firm in Richmond, Virginia, specializing in individual and organizational change; terryc@erols.com.*