

Learning as Strategy:
Training & Development's Role in the Talent Management Suite
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April 1, 2012

Abstract

The world is undergoing a crisis in talent management. Aging baby boomers and a workforce hesitant to commit to any one organization are only two of the challenges facing companies today. A rapidly changing global economy and shifting business needs make it difficult for an organization to define their talent needs—not to mention keeping that definition of needs current. A study done by the Business Performance Management Forum revealed that this crisis is intensifying, with “increased competition for talent leading to higher compensation packages, slower time to new hires, strains on quality and customer service, and reduced business flexibility (BPM Forum, 2007, p.2).”

In order to keep a flow of human capital, organizations must understand the need for the “talent management suite” to work together: for Strategic Workforce Planning (SWP) to understand the overall perspective of the company, for Training & Development (T&D) teams to target their curriculum towards strategic company objectives and for Career and Succession Planning (CSP) to guide the individual employee through their individual goals while for preparing for the future. These departments must recognize their interdependencies and work with each other's goals in mind. This paper will examine the role of T&D specifically—the challenges it faces internally and externally, and how T&D contributes to the overall function of the talent management suite.

Introduction

The traditional focus of workforce planning has been to make sure the organization has employees with the necessary expertise to help the company deliver their product or service. As information and production technology become more and more sophisticated, companies need to

make sure they have a competent workforce to utilize these developments for the benefit of the business. Training needs have been shaped by this need for expertise. Employees are developed in the competencies required to perform up to their optimal potential—this ensures the company has got the “latest and greatest” to offer. Then, a department of succession planning starts to look at the pipeline of talent to plan for the future staffing needs, and may initiate training for this more long-term goal. The perspective of these departments has traditionally been simply reactive of current and perceived future needs.

Yet the demands of business in the ever-changing world economy require that these three human resource functions work more closely together with company goals and business strategy in mind. A workforce with expertise is not only vital to the production of goods and services, it is essential in strategic planning for the organization. Companies must understand how to wield the talent under their own roof and recognize untapped potential in the market. They need to find ways to steer clear of unrealistic expectations. Motorola is a good, early example of using T&D to set business objectives. They realized that the new technologies were no good unless more people learned how to use them. Motorola was able to develop products by placing equal emphasis on training and expertise as it did on the integration of the new technology:

Motorola offers on- and off-site classroom education and training, laboratory training, and structured training in the workplace for employees at all levels of the organization. In addition to supporting Motorola's successful pursuit of its business objectives, many of its education and training initiatives serve as examples of best practices against which other organizations' [human resource] functions benchmark their performance (Torracco & Swanson, 1995).

Coping with the evolution of these human resource functions from a more internal staffing concern to a more competitive reality has revealed the need for coordination across functions, employee commitment to improvement, leadership competence, creativity and initiative, and open communication. It has been called a cultural revolution. Becton Dickson, a medical technology company, is a good example of this transformation from administrative to strategic responsibility. The CEO, Ray Gilmartin, wanted to set up transnational teams to service his global strategy and discovered that his company lacked the management and cultural skills required. He was unhappily surprised, especially since he had hired a new vice president for human resources, who initiated and implemented state-of-the-art training, appraisal, compensation and benefits systems—he won an award from the American Society of Personnel Administration for his work. At the same time, the line managers at Becton Dickson could see only expensive programs that did not make a significant contribution to the business. Gilmartin decided to merge strategy and human resources (HR), making it possible to align organizational behavior in a more common focus on the aspirations of the company's business (Beer, 1997).

Unless the CEO forces them to work together, as Gilmartin did, how does an organization get the different HR functions to cooperate with each other? How can each of the functions see their role in the larger scope of talent management? If you ask Plateau Systems, a Software-as-a-Service provider, they will tell you to purchase their enterprise technology to manage the data from these functions for use in strategic planning and management. They use the work of business writer Eric Krell to help point out the linkages between the functions: *performance management* will identify talent that can be developed, *compensation planning* can create incentives to facilitate that development, *learning goals* taken from performance appraisals people on their path of attaining more competencies, *development* wields the new competencies

and grooms those employees for advancement, and *succession planning* takes all these functions and builds a pipeline of talent into different pools that can be mined for leadership and key positions as demand requires (Krell, 2010).

Leaders in Demand: Build vs. Buy

Leadership directly affects financial performance, so that means retaining effective leaders isn't just a talent management priority—it is a crucial business demand. One the most acute needs is in the staffing of frontline leaders. These people are the liaison between the executives with their eye on overall strategy and line managers with their eye on the execution of tasks. They drive the company's culture, engagement, motivation and productivity (Taleo Corporation and Development Dimensions International, Inc., 2011, p. 6)

The numbers of retiring Baby Boomers create a huge hole in the frontline leadership pool. There are just too many empty positions for Generation X to fill. Organizations must determine whether to recruit talent or develop their existing workforce. This is described as the *build vs. buy* decision. Because there won't be enough of Generation X to fill positions, some companies are mobilizing to fast-track Generation Y workers into leadership roles. Other companies are hiring people that show potential for leadership. An effective Training & Development department will look for three distinct competencies for leaders—or the potential to develop these competencies: (a) networking skills, (b) ability for innovation and creativity, and (c) being agile with coaching and collaborating. These qualities relate to the changing environment that defines business today. The T&D staff must build these assets from their current stock of human capital or buy these assets by hiring new people (Taleo, p. 5–7).

Studies have shown that many managers don't really want to be managers at heart. They probably accepted the promotion because of the compensation increase, and less because they wanted to develop themselves, advance their career, make a contribution, lead, or have more power and influence. What is going wrong with frontline leaders, and why aren't they ready for leadership? Taleo Research gives five reasons why. First, even though organizations say they want to promote from within, the majority end up hiring leaders externally or based only on their technical expertise. Next, most frontline leaders have at least one blind spot in which they think they are competent when, in fact, they are not. Third, the development plan is not always written down, which makes any approach lackadaisical. Fourth, the training doesn't address the most important needs of managing relationships and guiding interactions between staff. Lastly, most managers feel they are all alone in their development, and see little, insufficient or no support from their manager or their organization (Taleo, p. 8).

In the talent build, companies with savvy T&D directors are working to change this situation through the creation of relevant pools of talent and job rotation programs. In the talent buy, T&D are helping to improve the orientation, or "onboarding" process for new hires. In both of these areas, T&D aligns their actions to company strategy.

Pools of Talent

T&D must build pools of talent from both within the organization and without. Talent Intelligence is the compiled information about an employee's competencies based on performance reviews. The employee's talent profile should contain all the elements of that person's skills, experience, and performance. The information can be structured so that it can be accessed by the organization to identify the mobility of their workforce, the gaps in skills that

must be addressed, and the potential for emerging leaders. Pools of talent are formed from this information. These pools can be accessed by the talent management suite and help them see where learning is needed. They will help answer the questions, “Who will be the next frontline managers and senior executives?” and “Who will get there with some development?” (Taleo, p. 12–17)

A Leadership Talent Audit is a tool that can help T&D build leaders. Competencies are listed and ratings from performance appraisals are charted. This helps T&D see where the holes are, for example, looking at the rows of ratings, Joe would be a good fit for management unless it is a high-pressure situation—there is one area for training that will maximize his potential (See Figure 1).

Figure 1. Leadership Talent Audit
Employees are evaluated in key competencies to reveal training needs

Leadership Talent Audit from Manager Ready SM									
	Managing Relationships	Guiding Interactions	Coaching for Success	Coaching for Improvement	Influencing	Delegation & Empowerment	Problem Analysis	Judgment	Planning & Organizing
Exceptional	39.4%	6.1%	9.1%	9.1%	6.1%	3.0%	9.1%	21.2%	12.1%
Strong	21.2%	18.2%	36.4%	9.1%	12.1%	24.2%	39.4%	21.2%	27.3%
Moderate	12.1%	45.5%	42.4%	66.7%	36.4%	42.4%	24.2%	30.3%	60.6%
Limited	27.3%	30.3%	6.1%	12.1%	42.4%	27.3%	27.3%	27.3%	0.0%
Low	0.0%	0.0%	6.1%	3.0%	3.0%	3.0%	0.0%	0.0%	0.0%
Chen	3	4	4	2	5	2	3	3	4
Tracey	5	3	4	3	3	3	4	5	3
Li	5	5	4	5	4	4	4	3	3
Len	4	3	3	2	3	3	4	3	3
Patricia	5	3	4	3	2	2	3	3	4
Isabella	5	4	4	3	3	3	3	4	4
Angelina	2	3	3	3	2	3	2	4	3
Douglas	4	2	3	4	2	4	2	3	3
Gerhard	2	2	3	1	2	3	3	4	3
Michael	2	2	3	3	3	3	4	3	3
Ronald	3	2	3	3	2	3	2	3	4
Nancy	5	3	4	4	2	2	3	2	3
James	2	4	4	3	2	4	2	3	3
Ann	5	3	3	3	3	3	4	5	4
Trish	3	3	3	3	4	4	2	5	3
Mali	4	3	3	4	2	1	2	4	3
Elmar	2	2	3	3	2	3	3	2	3
Wren	5	3	5	3	2	3	4	5	5
Paul	2	2	1	2	3	3	5	2	5
Arvind	5	4	4	3	2	2	4	5	4
Daksh	4	2	2	3	4	4	4	4	3
Tina	5	3	4	4	4	2	3	2	3
Gregor	2	4	4	3	2	4	2	3	3
Stephen	5	3	3	3	4	3	4	2	4
Lydia	3	3	3	3	3	4	2	5	3
Richard	4	3	3	4	3	2	2	4	3
Karen	2	2	3	3	3	2	3	2	3
Nedra	5	3	5	3	2	3	4	5	5
Pete	2	1	2	2	2	3	4	2	5
Froya	5	4	4	3	3	2	4	4	4
Qing	4	2	2	3	3	4	4	4	3
Michelle	5	4	5	5	1	4	5	3	3
Greg	4	5	4	3	3	2	4	3	4

Learning Positions

Internal mobility and job rotation programs can be highly effective vehicles for learning and development and consequently create pools for ready-to-perform leaders. This is the talent build in action. Research shows that internally developed leaders achieve productivity 50% faster than external candidates. Internal candidates may understand organizational politics that are crucial to operation, and may also already enjoy rapport with their colleagues (Taleo, p. 13). The mentor side of the equation can also be a positive build of internal human capital—besides the mentee being developed, the mentor is developed through the recognition and responsibility associated with being put in the “Key Talent” pool.

Learning positions are very efficient. A person can get new ideas or clarification on existing ones through the new perspective provided by the position. These ideas remain only theory until that person gets the chance to act on them. What T&D must do in crafting effective learning positions is to find those relevant opportunities for that person to experiment and practice his or her new ideas. No classroom can give that person the chance to experience the challenges faced on a real assignment and learn how to face them. This is commonly known as the 70:20:10 methodology. It means that 70 percent of learning comes from actual work assignments, 20 percent of learning can be gleaned from other people working with them on the job or as a mentor, and only 10 percent of learning is gained from a formal, classroom situation (Schroff, 2006, p. 34–35).

The 70:20:10 rule is probably most vital in the changing landscape of the medicinal world. A physician necessarily must have real experience with real patients. That, however, is only part of the need. Major changes in healthcare involving financing, reporting requirements, standards for accountability, team-based care, and clinical process improvements are shifting the

basis for medical leadership. Competencies are being expanded to address the need for superior coordination and information sharing across different medical disciplines. Traditionally, physician leadership has relied too much on the 10 percent potential of formal training, and suffered from the lack of on-the-job development options, coaching and mentoring. Tracy Duberman, CEO of The Leadership Development group, relates on Dr. Smith, a highly skilled physician and MBA who was passed over for promotion and wondered, “What is missing?” So he began to work with a respected medical leader for mentoring. Simultaneously he found a coach to help him identify his core strengths in order to manage change and teams. After one year Dr. Smith came away with improved navigation, listening, and validating skills and was recognized as a potential leader. Eventually he became the CMO (Duberman, 2011, p. 66–68).

At some companies these learning positions last for years. They can be rare positions in which knowledge can be passed on that normally is not available to T&D. This is a critical factor in succession planning—unless the institutional knowledge from those rare positions is shared and cultivated, the company will have lost a valuable asset when that person retires or moves on. Cultivating human capital through learning positions can produce the leaders of tomorrow. Candidates learn the new position under the mentor’s guidance, and usually gains a new respect through increased understanding of how that position works within the overall organization. In particular, this wider knowledge can prepare that candidate to lead a new branch of the company when they expand to a new country. T&D facilitates an expansion strategy by helping to identify what the key learning positions are in the company, and making the job rotation happen in time to prepare individuals for leadership (Tennant, 2012).

Cummins, Inc., a manufacturing company based in Indiana, recognizes the need to wield extensive technical expertise with leadership qualities. In 1994 they launched an Engineering

Development program that is still in use today. Their program takes five years and candidates go through at least four job rotations. Cummins is very selective with candidates, accepting only college graduates and involving no more than ten people at a time in the program. Their recruiting criteria include technical success as well as leadership skills. They try to find recruits there have not just a record of extracurricular activities—they also need to have been leaders in those activities. The program requires significant commitment and expense. Each job rotation comes with its own set of training and tools, each five-year program employs a mentor that is paid additional salary for this role, and there are quarterly meetings with senior leadership from all of the company's areas of operation in which these leaders are expected to give substantive feedback. Cummins has worked hard to make sure expectations of students are in line with the business goals. Even after 17 years, there is still significant internal demand for the program. Cummins has certainly designed an effective program (Jusko, 2011, p. 18).

Challenges in Building Talent

Not all companies enjoy the success that Cummins does. After the rigor of getting into a talent development pool, internal candidates can become frustrated and humiliated when they are not picked for the job. Often internal candidates are competing for the same job, which can set up some negative politics within the organization (Tennant, 2012). Other times the development program may have accurate objectives but the design of the program is flawed or inappropriate to the tasks set for achievement (Teicher, 1995).

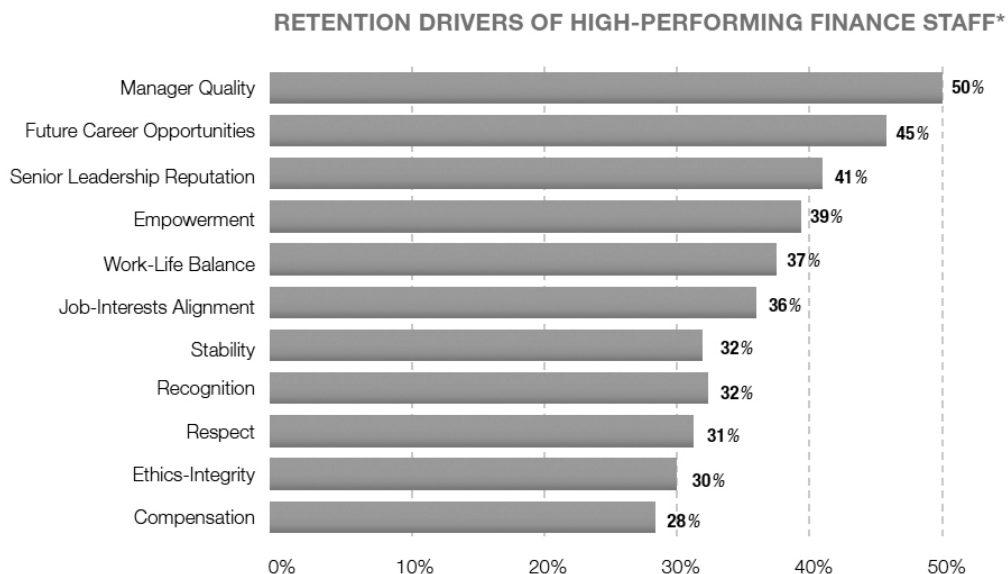
Worst of all, the company stands to lose when these employees, who now have been trained at the expense of the company, get fed up with their frustration and look for other jobs. Armed with a new-and-improved resumé and social networking sites, these employees can be

easily cherry-picked by other firms. Some companies have payback clauses that require an employee to reimburse the company for training in the event that this situation occurs. However, these clauses are largely ineffective, and the company almost always absorbs cost of a lost opportunity (Tennant, 2012).

Retention Issues and T&D for Potential Leaders

“People don’t leave companies, they leave their managers.” This is an enduring fact that challenges all HR departments. Strong leaders will certainly increase retention of workers, and of course the opposite is also true. Compensation is actually the least important reason, statistically, why people leave their jobs. Research at a finance company shows manager quality on one end of the spectrum and salary on the opposite end (See Figure 2).

Figure 2. Retention Drivers of High-Performing Staff
The most important reasons people want to stay in their jobs.



*Average percentage improvement in an employee's intent to stay, when satisfaction with a given attitude rises from the 10th to the 90th percentile of survey participants' responses.

Source: Finance Strategy Practice, Corporate Executive Board

The retention of the leaders themselves is also an issue for T&D. Best practices for developing “high potentials” for leadership positions do not exist. The success of the Cummins program mentioned above doesn’t necessarily translate to other organizations with different strategies and culture. The selection criteria for development pools can be confusing and some people that are great contributors can become demoralized by not being included. When a good manager does get included in the development program, it removes them from their day-to-day operations, and this can be costly to the company.

Research has identified some “emerging” best practices for development programs, including the following: (a) aligning the program with corporate objectives, (b) choosing candidates carefully, (c) rotating people through the right jobs, and (d) communication honestly about who made the list. The last point is made specifically to address the fact that “the only real reason to keep it quiet is that you suspect the process is overly subjective or unfair” (Fernández-Aráoz, Groysberg & Nohria, 2011).

Retaining high potentials encompasses a number of elements. Many companies think that just being identified as a key candidate for leadership is enough reward in and of itself. Smarter companies will see that this should be combined with compensation incentives. This can be tricky to implement: the compensation must be aligned with the business objectives for building lasting strengths in performance from the individual, and the compensation incentive should not be excessive. Only in combination with the internal motivators of recognition and the need for achievement will the incentives be effective. Another reason not to get too excessive is the perceived loss of equity that other employees may experience, by not being selected for the

development program (Fernández-Aráoz, et al, 2011, p. 83). T&D needs to orchestrate all these factors so that potential candidates for leadership don't slip their the company's fingers.

Onboarding: An Important Part of Talent Management

Whether the company decides to build or buy talent, the orientation of the employee to the position is one of the most important roles HR can play in a successful acquisition.

Onboarding is the process of thoroughly orienting the new hire with the organization's operations, culture and business goals. Another realization is that successful onboarding is also important in the promotions and shifting roles of existing staff. Internal moves need to be treated the same as new hires. The five A's of onboarding involve 1) communicating the *alignment* of the position with the company's business goals, 2) the *acquiring* of the right person for the job, 3) *accommodating* employees with the right tools for the job, 4) helping them *assimilate* into the flow of work with their new colleagues, and 5) helping them and their team *accelerate* the delivery of better results in a shorter time (Bradt & Vonnegut, 2009, p. 3–4).

Onboarding is one of the most important ways that HR can contribute to the long-term success of staffing. However, a common problem is the lack of coordination between recruiting, interviewing and hiring. This can lead to disengagement and misalignment of the new hire to the organization, and nullify the hard work of acquiring that individual. Since onboarding is not something that is done every day, many companies don't have a policy for it. One manager remarked:

I have witnessed a lack of collaboration, cooperation, and coordination between the recruiting lead, the human resource generalist, and the hiring manager, that actually

caused a new employee to show up for her first day on the job, without anyone knowing it” (Bradt & Vonnegut, p. 5).

No matter who gets the job of conducting an onboarding process, T&D should prepare for its successful execution as part of the entire talent management system. The onboarding agent needs to have basic change management and facilitation skills, and communicate the relevance to company business strategy, key relationships to leverage, and main objectives of the position to the newly-hired employee.

The ROI of Training

One of the biggest challenges for T&D managers is to figure out how to measure their work. Companies need to know their Return on Investment (ROI) to help justify to their shareholders the expense of training. The ROI of producing a clock radio, for example, is relatively easy to measure. Human capital development is much harder to quantify. “Uprooting old behaviors and planting new ones takes time” (Arrussy, 2012, p. 8). Case studies in behavior change is one way to produce a measure of success. For example, a Customer Relations Management firm had a severe technological handicap, yet managed to increase customer satisfaction 20 percent in 12 months by training managers in employee engagement of staff—and this was accomplished without even addressing the technology problem (Arrussy, 2012, p. 8).

Since 1959, the Kirkpatrick Model has been used to measure and evaluate training. The model looks at four levels: 1) Reactions—how well did the learners like the process? 2) Learning—what did they learn? 3) Behaviors—what were they able to change after the learning? and 4) Results—what were the tangible results of the learning? (Lin, Chen & Chuang, 2011, p. 928) In recent years this model is taking on a revised dimension, focusing more on performance

rather than just the behavior that affects that performance. As Thomas Gilbert states, in his book *A Leisurely Look at Worthy Performance*, “performance is a better objective than behavior because performance has two aspects: behavior being the means and its consequence being the end . . . and it is the end we are mostly concerned with” (Gilbert, 1988). Taking the Kirkpatrick Model and flipping it around into a model that Gilbert would consider more worthy, we get these new levels: 1) Result—what will be the outcome for our business? 2) Performance—how will the employees need to perform in order to achieve this outcome? 3) Learning—what knowledge, skills, or resources do they need to perform? and 4) Motivation—what do they need to perceive in order for them to own the objective? (Clark, 2012).

In addition to these perspectives on measurement, companies are investing in automated Learning Management Systems (LMS) to help measure the cost of training. The effectiveness of T&D is greatly affected by budget, and the training function is essentially a cost center. Without help, as much as a third of the learning staff's time is stretched across non-strategic tasks. An LMS system can help alleviate this burden. Outsourcing the administration is another way to reduce the overall cost of training. This can be very effective, because the experts who work with outsourcing providers are up to speed on industry best practices (Langlois, n.d., p. S3).

One study showed that many companies measure the total cost of a training program, rather than the cost per student. This implies that the training organizations are not able to focus their time on operational excellence and efficiency. (Bersin, 2006, p. 12). Just as the training itself is a cost center, the measurement of training is also a cost center. Another study found that “organizations that implement a robust measurement program have 12 percent to 22 percent higher levels of efficiency and effectiveness” (Bersin, 2006, p. 14).

Conclusion

There is no doubt that the crisis in shifting demographics is creating increased demand for learning and developing an organization's talent. At every stage in the process of talent management, learning can safeguard a company's most valuable assets—its people. T&D can act as the glue in all the functions of talent management. They can help SWP decide to build or buy talent. They can help CSP prepare for the future through talent development pools and learning positions. They can help existing leaders refine their skills and increase retention of employees. There is no end to learning, on any level of business, and this is just as true in the business world as it is in academia. As John F. Kennedy said, "Leadership and learning are indispensable to each other."

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