

## PART TWO

# | Case Studies

This part of the book contains ten case studies from major global organizations that cover a wide range of learning initiatives. The cases are diverse and shed light on corporate learning challenges from a variety of angles. They appear in no specific order.

The following brief abstracts provide an overview of the key issues and challenges of each case.

### **Case 1: Innovating Learning Through Design and Architecture (UniCredit)**

UniCredit is the third-largest bank in Europe, with activities in more than twenty countries.

The company is the result of a breathtaking series of mergers and acquisitions, which made it grow from 16,000 to almost 180,000 employees in fewer than five years. Such growth brings major challenges in strategic and organizational alignment as well as in cultural and political integration. Case 1 tells the story of UniCredit's architecturally unique Torino Learning Center, an environment that has been created exclusively for the purpose of systematically enhancing transformational learning. A highly flexible and adaptive space in combination with cutting-edge multimedia technology encourages intensive peer-to-peer discourse, fostering the post-merger integration process. We describe in detail the features of this "enabling learning space" and how their design contributes to challenging mindsets, unfreezing perspectives, building relationships, and imagining new ideas.

## **Case 2: Top Executive Leadership Learning (Siemens)**

Siemens is one of the world's leading engineering conglomerates, with about 460,000 employees in 192 countries.

In most large organizations, the members of the executive board and the CEOs of major market units rarely perceive a personal need for learning. Having reached the top of the organization, they are typically beyond internal talent management systems, and their role in traditional learning architectures—if any—is as mentors, project sponsors, and providers of strategic guidance for the learning agenda. Case 2 tells the story of how the strategic and organizational transformation of one of the world's largest corporations was designed as a didactically structured leadership learning process. The project significantly affected the mindsets and the collaboration culture of the top eighty-five executives of the firm and changed the culture of strategic and organizational dialogue. The initiative also created an invaluable network of committed senior leaders for the future agenda of corporate learning in Siemens worldwide.

## **Case 3: Phoenix from the Ashes: How a Corporate Learning Initiative Reinvented an Ailing Business (ABB)**

ABB is one of the world's leading engineering companies.

Companies in serious financial trouble seldom if ever look to their learning and development group for answers. The usual thinking is that spending money on organizational development would not contribute to rebuilding a sustainable business. Case 3 contradicts that view. It tells the classical tale of a business unit that was close to extinction. Facing massive layoffs and near-bankruptcy scenarios, employees and executives teamed up in a learning process that led to a reinvention of the business model. Today this unit is one of the most profitable and fastest-growing businesses of the ABB group. The case makes a convincing argument for utilizing a comprehensive learning design to guide cultural transformation that realigns strategy and organization alike. It also provides interesting insights into the political and strategic dynamics of a complex change process.

### **Case 4: Healing Post-Merger Chasms: Creating Corporate Values from the Bottom Up (EnBW)**

EnBW is a utility company operating in Germany, Central Europe, and Eastern Europe.

Managing integration and cultural unity are key challenges when dealing with mergers, acquisitions, takeovers, or fundamental changes in leadership or strategic direction. Many organizations end up doing little or nothing to redefine their vision or establish new corporate values to motivate and guide employees. Case 4 presents the story of EnBW, a German utility company with 21,000 employees and more than six million customers, which after its formation following a merger experienced years of cultural disunity. The solution came when the company's corporate academy spearheaded a far-reaching initiative to redefine the company's values using a bottom-up campaign that invited nearly 1,000 employees to participate in choosing new values. The case demonstrates well how change is instigated not so much through "rolling out" messages in traditional settings, but by designing a comprehensive *organizational* process that introduces dialogue and reflection into the fabric of the entire company. The EnBW experience is also a great example for a post-merger integration project without labelling it as such.

### **Case 5: Designing Customer Centricity for Multiple Market Segments: The *perspectives* Project (BASF)**

BASF is the world's largest chemical company.

Corporate learning has long been involved in educating staff, especially marketing and sales, on the elements of customer service. However, these programs seldom raise the fundamental question on how a company structures its business processes to drive them from the outside in. Case 5 tells the story of *perspectives*, a strategic initiative that fundamentally challenges the role configuration between supplier and customer, reaching deep into all functional elements of the organization. At first glance, BASF's *perspectives* project may seem like just another effort to improve customer relationships, but as the case unfolds, we unveil the architecture of a deeper transformational learning

initiative that truly reinvents formerly unquestioned routines and opens up new and exciting opportunity spaces for the company and its customers alike. The case is a great example of a corporate learning initiative that has had a major impact on value chain dynamics.

### **Case 6: Transforming the U.S. Army Through an Informal Leadership Learning Network (U.S. Army)**

Many organizations have launched communities of practice with the hope of fostering knowledge sharing, connectivity, and the exchange of best practices among employees, but few have had an impact on their organizations as much as Case 6 demonstrates. It takes place in the U.S. Army, normally a bastion of hierarchical command and control, and focuses on a grassroots effort initiated by a small team of Army commanders to create an informal network to share ideas and learn from each other to improve their leadership capabilities. The case relates how and why the commanders launched the network, how they designed its architecture to invite participation and sharing, and the steps they took to build a user base, gain acceptance, and grow the community into what has become a highly respected forum for knowledge and training that is today fully endorsed and operated by the Army. The case also offers some interesting perceptions into the type of organizational environment that may ultimately be necessary to develop a successful informal, self-organized, horizontal network.

### **Case 7: The Executive Hero's Journey: Going Places Where Corporate Learning Never Went Before (PricewaterhouseCoopers)**

PricewaterhouseCoopers (PwC) is one of the world's largest professional services firms.

Case 7 tells the story of Ulysses, a project launched in 2001 in which small cross-cultural teams of senior PwC partners take a four-month leave of absence to go on a challenging field assignment in a developing country. Their challenge is to make

a sustainable positive impact on a complex economic and social issue. Together with nongovernmental organizations (NGOs), community-based organizations, and intergovernmental agencies that have agreed to work with PwC, the executives must work on a specific project in a local community that is struggling with the effects of poverty, conflict, and environmental degradation. Ulysses effectively sends PwC executives on a hero's journey in which they must meet severe challenges. The experience addresses numerous strategic issues of the firm, such as personal growth for its key talent, corporate responsibility, cross-cultural collaboration, the development of networking and relationship competence, political competence in terms of multistakeholder orchestration, and the creation of a sustainable corporate brand that is differentiated by the quality of relationships with clients, colleagues, and the broader community.

### **Case 8: Managing the Strategic Asset of Cutting-Edge Technological Expertise (EADS)**

EADS is the maker of Airbus and is the second-largest aerospace company in the world.

Because of the level of high technology required in all its products and services (airplanes, rockets, satellites, jet fighters, missiles, drones, and so on), research and engineering capabilities at EADS are key differentiators in their market. Managing the expertise of 1,000 researchers and more than 40,000 engineers is of major importance for this organization. Case 8 sheds light on how EADS approaches this tall challenge through an integrated effort that combines learning interventions, talent management tools, and organizational systems and processes. To assure retention, the initiative created a separate career ladder for experts that is parallel to management, with its own set of rewards and benefits tailored to this group. EADS also put in place several programs to encourage communication, networking, innovation, and knowledge sharing among the experts and the rest of the company. The case is a great example of strategic competence management in the high-technology space.

### **Case 9: Leadership Learning as Competitive Strategy in the Chinese Market (Novartis)**

Novartis is one of the world's leading pharmaceutical companies.

Global corporations tend to standardize their learning and development programs everywhere they operate. They base this on the belief that it is necessary to foster large-scale uniformity of values and cultural unity. However, a more networked approach to globalization requires flexible cultural adaptation that allows for difference while strengthening an international perspective. Novartis recognized that it had to use a different strategy in its operations in China, where talent shortages, high turnover rates, and a non-Western cultural mindset presented the company with significant challenges in attracting, developing, and retaining managers. Case 9 tells the story of how the company established a dedicated China Learning Center and partnered with Beijing University to adapt its leadership development programs for the Chinese context. The payoff has been a tremendous increase in retention and a growing globalization of Novartis's Chinese executive leadership.

### **Case 10: *First Choice*: The World's Largest Customer-Focus Initiative (Deutsche Post DHL)**

Deutsche Post DHL is the world's largest logistics company, with 550,000 employees in more than 200 countries and territories, and the second largest employer in the world.

Case 10 presents the story of *First Choice*, a learning initiative of unprecedented scale that combines customer focus with employee engagement. The case spells out how Deutsche Post constructed a global learning initiative that systematically helps every business unit identify inefficient processes and, using Six Sigma, fix them. Meanwhile, elements of the initiative are designed to help the company's more than 50,000 managers conduct workshops with their employees to precisely define customer service in words and deeds. The case offers a lesson in how to design architectures for very large-scale change management, what anchors are required, what didactical tools are vital for success, and how to measure results. It's a lesson about the power of process and simplicity when it comes to dealing with scale.

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**Exhibit P2.1. Case Study Overview**


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| UniCredit              | Enabling Bricks and Mortar Architecture                        |
| Siemens                | Linking Strategy with Top Leadership Development               |
| ABB                    | Business Transformation and Reinvention                        |
| EnBW                   | Post-Merger Integration through Values Generation              |
| BASF                   | Organizing for Customer Centricity                             |
| U.S. Army              | Communities of Practices for Real-Time Learning                |
| PricewaterhouseCoopers | Leadership Learning Creates Authentic Corporate Responsibility |
| EADS                   | Assuring Expertise as Core Competence                          |
| Novartis               | Balancing Globalization and Localization                       |
| Deutsche Post DHL      | Customer Focus, Employee Engagement, Process Excellence        |

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