

Champions of Learning Celebration

SHARING AND LEARNING

JUNE 9, 2022

20

BEST PRACTICES OF

22

TALENT DEVELOPMENT



ASSOCIATION FOR
TALENT DEVELOPMENT
SOUTH FLORIDA CHAPTER



**"An organization's ability to LEARN,
and translate that learning into
ACTION rapidly is the ultimate
COMPETITIVE ADVANTAGE."**

Jack Welch, former General
Electric CEO

EVENT PROGRAM

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JUNE 9, 2022 * 5:30PM - 9:00PM
PINE ISLAND RIDGE CLUB, 9400 PINE RIDGE DRIVE, DAVIE



"Practice is the hardest part of learning, and training is the essence of transformation."

Ann Voskamp, Author

WELCOME

AND

THANK YOU!

Every year the Association for Talent Development South Florida Chapter invites local companies to share a successful project or initiative that has positively impacted employees and the organization. Your participation in this effort is essential to maintaining a thriving Talent and Development community. So, thank you for your contributions and support.





"Learning never exhausts the mind."

Leonardo De Vinci



Gordon Chen, MD

Chief Medical Officer, ChenMed

Gordon Chen, MD is championing a physician-led healthcare revolution. He created and directs a world-class leadership development culture that empowers doctors to be the change they want to see in healthcare while fulfilling purpose and creating personal opportunity.

As ChenMed's Chief Medical Officer, Dr. Chen partners with the Chief Operating Officer to lead the company's growth plan, drive high-quality outcomes, and steward the P&L in the rapidly expanding organization. Dr. Chen's influence- and outcomes-based approach have helped grow a full-risk medical practice into a multi-state enterprise that serves thousands of patients in hundreds of communities across America.

Dr. Chen believes that physicians' potential to lead and influence, combined with strong business leadership, can transform healthcare; and fulfill a moral imperative to bring better health and health equity across America. He has developed experiential leadership training programs to create world-class physician influencers empowered to spread value-based, preventive care through ChenMed's transformative primary care model.

Dr. Chen holds a bachelor's degree in economics from Brown University as part of Brown's Program of Liberal Medical Education. He accepted a scholarship and returned home to South Florida to attend the University of Miami Miller School of Medicine; and remained in Miami for his internal medicine and cardiology training. Dr. Chen is also the president of Nicaragua Medical Missions.

This Christian, non-profit organization creates medical mission opportunities to meet the needs of multiple underserved Nicaraguan communities. He is married to his medical school sweetheart, Dr. Jessica Chen, ChenMed's Chief Clinical Officer. They have four children.



Jessica Elizabeth Chen, MD

Jessica Chen, MD is co-championing a physician-led healthcare revolution. She designs and directs the physician talent development pathways that empower clinicians to lead improvements in clinical outcomes and make a tremendous impact on patients' lives.

As ChenMed's Chief Clinical Officer, Dr. Jessica Chen leads the company's clinician talent recruitment, clinical onboarding, ongoing training, and leadership development programs to achieve high-quality outcomes and maintain a strong culture in the rapidly expanding organization. Dr. Jessica Chen's focus on recruiting and retaining the best clinical talent has helped grow ChenMed's full-risk medical practice into a multi-state enterprise that serves thousands of patients in hundreds of communities across America.

Dr. Jessica Chen believes that inspired physicians with the right leadership development will play a critical role in transformative primary care for a better health system across America. Dr. Jessica Chen holds a doctorate degree from University of Miami and completed her residency in Internal Medicine at UM/Jackson Memorial Hospital. She remains active in Nicaragua Medical Missions, a Christian, non-profit organization that creates medical mission opportunities to meet the needs of multiple underserved Nicaraguan communities. She is married to her medical school sweetheart, Dr. Gordon Chen, ChenMed's Chief Medical Officer. They have four children.



"The healthiest companies are always characterized by organic talent development."

Margaret Hefferman, Entrepreneur



Sharing and Learning

BEST PRACTICE

Talent Development



**"What got you here, won't get
you there."**

Marshall Goldsmith, Author

Summary

For over 20 years, our Customer Relations Management (CRM) software program was Compass which was developed and supported in-house and ran on the Microsoft Internet Explorer browser. When Microsoft introduced Edge as their new browser and decided to no longer support Internet Explorer, AutoNation was faced with the decision to build a new CRM in-house that could run on Edge/Chrome or purchase a CRM from an outside vendor. After a year of research, AutoNation chose CDK eLead as our new vendor. The eLead CRM is used by more auto dealerships in the US than any other system. After 18 months of testing and preparation, the first pilot of the new CRM, that we called AutoNation GPS (AN GPS), was launched in May 2021. The initial training plan created by CDK for the rollout consisted of:

- Two 1-hour virtual workshops for sales associates and four 2-hour virtual workshops for sales managers facilitated the week prior to “Go Live” training.
- One week of “Go Live” in-store training by eLead trainers supported by four AutoNation trainers and corporate staff.

After the initial launch, one store in May and three stores in July, it was evident that the initial training plan was ineffective. The associates and managers struggled with the use of the new CRM and the 60+ days that it took them to become proficient was viewed as unacceptable by senior leadership. The AutoNation L&D team was given the challenge of developing a new training solution to address these concerns by September 1.

Vital Information for Others to Replicate

- Gain cross-functional support for major projects to ensure key stakeholders in all impacted areas agree with the training solution.
- Encourage subject matter experts, trainers, and instructional designers to collaborate early in the process.
- Ensure trainers and SMEs are involved early in the process to create buy-in and avoid potential conflicts with the instructional designers.
- Use internal and external SMEs to ensure that features of a major software initiative are integrated into the training solution. It provides credibility for your training content.
- Leverage trainers, SMEs, and other operational resources to help develop content if they have expertise in the material being taught.
- Develop a layered training approach to appeal to all types of learners, allowing participants to see, read and do.
- Create simulations and sandbox exercises when launching a new software program so users can “play” in a safe environment.
- Chunk learning content by creating TikTok-type videos.
- Provide a training resource location that can be accessed by all Associates that includes all training material, job aids and recordings of all webinars.
- Hold separate Q&A sessions after the first week of “Go Live” to give users the opportunity to ask questions after using the system for a week.
- Create a sustainment training solution to provide more advanced training after any major software initiative has been implemented.
- Use Learning Management System (LMS) to assign and track training participation.



Development of High Potential Talent

Contact: Tatiana Schrader

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Summary

At Baptist Health South Florida, the Talent Management process is a part of our two year business strategy to develop and “grow our own” talent in order to meet the organization’s current and future business needs. Through our systematic approach, we ensure that the right leaders from across the organization are identified and developed to create a robust succession plan. Managers and above participate and use our online system to accomplish the assessment and calibration process. The end goal of the process is to identify leaders who can immediately or with development move into vacant positions or newly created positions as part of succession management for the organization.

Last Year we opened the system and successfully calibrated 1,200 leaders (managers, directors, assistant vice presidents and vice-presidents). After they were successfully calibrate and identified in our 4 Box matrix (Performance vs. Potential). Later the Talent Development team completed post calibration conversations to carefully select and assess the development path for those in the high potential list. Our talent offers vary depending of the placement of leaders in the 4 Box, and we have taken a strong approach to focus on those identified as highs potential leaders with an internal and external learning catalog offering various levels of learning using the 70 - 20- 10 approach.

Vital Information for Others to Replicate

This is a business practice that has resulted in the retention and development of our own talent with years of adoption and lessons learned to make the process suited for our internal talent needs. We have learned how to adapt this process to serve leaders across geographies in South Florida and Palm Beach county with the use of technology and sponsorship of our Sr. Executives. The key to replicate a program like this is to make sure you have the right talent management strategy, the sponsorship of your leaders and the discipline to follow the process.



New Hire Training Program

Contact: Lauren Lipsky

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Summary

Blue Stream Fiber is a 40-year-old company that over the past few years has experienced substantial growth in employee headcount. Whereas we were onboarding 1-2 people a month, we're now onboarding 8-10 people per week. As we continue to grow our customer base, it is pertinent we develop a seamless onboarding experience for our employees. To do so, our training team (in less than 3 months) created and launched in Q1 2022 a 1-day training session for all new hires that provides new employees with key high-level information about the company to ensure they are set up for success in their new roles from their first day.

In this session, new employees are given a warm welcome from the Blue Stream team and are introduced to the company's vision, mission, and core values. We also review our core products, services and customer bases and the key technical systems that make Blue Streams internet and entertainment magic happen. By engaging in this initial training day, employees are equipped with information that will support their work in their new roles regardless of which department in the company they join.

Vital Information for Others to Replicate

1. Don't let a lack of resources be a barrier to development and launch: The training team recognized early the importance of creating a more seamless onboarding experience. With little more than a few slide decks, a Zoom account, and A LOT of curated support within the company, we were able to develop and launch an informative, seamless, and engaging training day that created an engaging and enjoyable first day experience for our new hires and streamlined the on boarding process.
2. Consider virtual delivery- we needed to deliver the same training for new employees in several locations throughout Florida. We used to Zoom to facilitate to ensure no matter where an employee was on boarding, they could access the training seamlessly.
3. Leadership buy-in is critical: not only did I rally support from senior leaders, but I also ensured they had an opportunity to speak to new hires directly- the conversations that our senior leader and our C-suite hold during the training day are some big highlights for our new employees!
4. Home in on the most critical topics: We identified what key information is essential for our employees to know to be successful from the start and focused on those core topics solely. It is better to lean into a few relevant topics then trying to smash too much into one training session.



Operations Training Task Team

Contact: Adriana Rodriguez

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Summary

Our company's number one differentiator in the market is what we call Royal Service which drives our company culture and the way we conduct business.

Given that it is such an integral part of how we engage our internal and external clients, we needed to develop a way to carry out the message across the company without the ability to increase headcount in the L&D team. In order to carry out this mission, we created an Operations Training Task Team that was piloted a few years ago and recently re-launched at the start of 2022.

This program includes select individuals within the organization that have been nominated, evaluated, trained, and then guided through the process of delivering our signature Royal Service Workshop within their respective regions.

Vital Information for Others to Replicate

- Engagement is key. Allocate time to engage with the team. It is a voluntary role. How do we make them feel valued? How can we make this experience worthwhile for their career growth?
- Set clear expectations surrounding roles and responsibilities between Operations and L&D; L&D support the program and provides resources and support with enhancing facilitation skills, while Operations owns identifying immediate needs and utilizes their resource as needed
- Recognize outstanding performance and share progress with the Executive leadership team.
- Identify the key point of contact in the L&D team that will focus on supporting the Ambassador program.



JOSEPH ABRUZZO
CLERK OF THE CIRCUIT COURT & COMPTROLLER
PALM BEACH COUNTY

Virtual Customer Service Center

Contact: Linda Chapman

lchapman@mypalmbeachclerk.com

Summary

Work is no longer a place that you go. It's a thing that you do. In March 2020, what we saw is that organizations moved all employees whose roles were not considered essential to working remotely at home. They were issued a laptop with VPN access and shuttled them to the remote setting as a safeguard from the COVID-19 pandemic. Smart organizations realized that jobs needed to be re-examined and the Clerk of the Circuit Court & Comptroller considers itself smart.

Our organization took this concept a step further and looked at functions within a job role to offer jobs that typically were not remote to be remote some of the time. Using a mix of technology - Zoom, Q-Flow and Paylt - certain front counter transactions were identified for remote service. What this meant was that training to provide these transactions had to be revamped to include use of the new technologies, retraining to provide virtual customer service, cross-training of many fringe services that front counter clerks were unaware of and other tasks that would fill downtime if any, while clerks were providing virtual customer service.

Vital Information for Others to Replicate

The training effort associated with this initiative is significant. A lot of testing was also required. We conducted several mock sessions with trainers performing assessments of employee performance in the specialist service counters (Zoom breakout rooms) and in the triage (Main meeting room). After mock sessions, there will be a pilot with "live" customers and then employees will provide the service from home to test the reliability of their wi-fi and internet services before the go-live.



21 & 90 Day New Hire Focus Group

Contact: Adriana Silva
asilva@fontainebleau.com

Summary

With the Great Resignations, employees are looking to be a part of high-performing teams with healthy cultures. Fontainebleau Miami Beach has launched many new initiatives to continue cultivating our exceptional culture.

We put an emphasis on employee engagement and Team Member loyalty. Our goal is to hire and retain top talent and for years our turnover rate has been under 20%, with an average tenure of 10 years. We take pride in our Team Member loyalty and have recently implemented a 21-Day and 90-Day New Hire Focus group. The sessions allow us to openly discuss the onboarding process and provide any support that may be needed to our newly hired Team Members and future cohorts.

We kick off the session with an open discussion around the culture at company name omitted and we then welcome our Executive Committee Members to break out into smaller groups and listen to the needs of their respective Team Members. Each VP shares insights from their meetings and the leadership team reviews the data to make any necessary changes and enhance the Team Member experience.

Vital Information for Others to Replicate

While the Bureau of Labor Statistics reports the Hospitality Industry turnover rate at 75%, company name omitted is well below this average. Hosting our sessions not only helps us understand what is going well but is an efficient way to uncover ideas for improving employee engagement.

As an outcome of these initiatives, we have found an increase on the overall Team Member Engagement and a slight decline in turnover. We continue to monitor our turnover on a weekly basis, which helps us capture the immediate impact of our programs.



Operations Training Task Team

Contact: Michele Knight

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Summary

Onboarding was suddenly changed to virtual during COVID. The existing team did not have the expertise to provide an effective onboarding experience in a virtual format. As a new employee and the only person in learning and development in the company I was asked to take a look at the onboarding program and see what I could do. After my initial review I discovered there were multiple aspects that could be changed to improve the onboarding experience for new hires and improve their speed to productivity.

Vital Information for Others to Replicate

1. Onboarding should have a buddy program to help the new hire acclimate to the team and organizational culture.
2. 30, 60, 90 day surveys should be implemented ongoing to gauge changes in new hire experiences.
3. It is helpful for managers to have templates on how to create positive onboarding experiences including sample new hire schedules for the first 30 days
4. Collaborate across the entire organization is critical for a major redesign project such as this. Buy-in from all levels is necessary and there is often a lack of awareness about the need for content revision for accuracy (new policies, etc).
5. We also will review turnover, but that will take time to collect.



Operations Training Task Team

Contact: Lauri Fern Glinsky

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Summary

Our initiative is to provide training to our people managers to be their staff's first mentor, hence the Manager as Coach and Mentor name. While we have many great managers here at VERTEX, we want to encourage and empower our new and existing managers to engage in our core value of Lifetime of Learning by further developing management style by thinking and leading as coaches and mentors.

Our initiative includes training people managers to ask great questions, actively listen, guide rather than direct, establish a sense of psychological safety in their daily interactions, and practice empathy with their staff.

Vital Information for Others to Replicate

Making sure that you have executive level support for any initiative is vital, but also having the data (like exit interviews) to support the importance of the initiative is necessary to show employees that you are taking feedback seriously. Making the initiative/program as interactive as possible has been really important in getting the engagement we were hoping for.



Operations Training Task Team

Contact: Debra Forte

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Summary

CORE (Creating Optimum Results Education) is our new hire onboarding and training program that is delivered in two, separate locations. The goal of the program is to provide tailored career support and development through a new employee's first 12 months with the company. The training program utilizes a blended learning approach incorporating a "tell, show, do" model through eLearnings, interactive virtual instructor-led trainings, side-by-side coaching sessions, and assessments. The training program consists of four levels of learning that build upon each other through learning specific topics within the company's sales process. Training topics are divided into "series" within the four levels and designed to be taken as self-paced to meet the learners' needs as just-in-time learning. The goal of the program is to simultaneously incorporate formal and experiential learning by introducing and reinforcing knowledge, skills, and abilities needed to proficiently perform within an employee's daily role. The training program was designed with technology at its core utilizing the LMS system and Smartsheet (a spreadsheet-based tool) to allow for reporting and tracking of learner progression in collaboration with the learner, their direct leader, and the learning and development team.

Vital Information for Others to Replicate

Reflecting on this large-scale project that required a high level of effort, we recommend that organizations adopt a feedback-rich culture grounded in continuous improvement. Using an agile approach during the initiative helped to optimize project management, maximize our resources, remain efficient during the design phase, and to meet our deliverable deadlines. We also attribute our success to engaging stakeholders early and often. Effective collaboration with subject matter experts, following the identified instructional design model, and identifying metrics to evaluate effectiveness were pivotal to the success of the project. Vital to know for replication:- Identify business challenges, resources needed, and program goals through effective needs analysis- Identify the technology tools needed to effectively capture, track, and assess learner progress- Establish intentional collaboration with subject matter experts, leaders, and future learners- Determine the most effective design and development model (ADDIE, Agile, SAM, ASSURE, etc.) approach for program goals - Ensure learning content is designed to support the flow of work incorporating both formal and experiential learning - Create level-based learning that is scalable and tailored to the learner to provide just-in-time learning and personalized support by their leader and the learning and development team- Create streamlined reporting customized for different audiences (executives, leader, learner, L&D, etc.)



"The only thing worse than training your employees and having them leave is not training them and having them stay."

Henry Ford, Founder of Ford Motor Company

CAROL SUSAN DEVANEY MENTORSHIP PROGRAM

Mentors and protégés have an opportunity to:

- Create empowering learning experiences for professional growth
- Network with other professionals while tuning up personal leadership skills
- Overcome obstacles that may stand in the way of your career success
- Recognize your potential as a contributing force in the ATDSFL Chapter

Our 2022 Protégé and Mentor Pairs:

Shelly Cline and Sean Muldoon

Jack Metzger and Vickie McCann

Lauren Lipsky and Greg Jenkins

Julieta Alvarez and Dana Whiteaker

Danielle Klarman and Robert Preziosi

Jameelah Bennett and Steve Yudewitz

Shaina Tsupros and George Romagosa

Felix Vargas and Laura Loucks

Liz Guibord and Gloria Mills

Adriana Rodriguez and Jimmy Glenos

Kim Beckett and Paul Signorelli

Jessica Munge and Marc Levine



Each year the program kicks off in February and concludes with a Graduation Event in June. At the half-way point participants meet via Zoom to discuss successes and strategies to keep the momentum going.





"Online learning can be a lifeline to those who have obstacles, such as geographical distances or physical disabilities."

Paul Levinson, Author,
Singer-Songwriter and Professor

2021-2022 ATDSFL CPTD STUDY GROUP

Every September for eleven Saturdays, the ATD SFL Chapter hosts a virtual Certified Professional in Talent Development (CPTD) Study Group.

Talented and motivated professionals looking to grow, learn, and give back to the profession strive to make a positive impact on their careers by taking on the certification challenge. Here are names of professionals who participated in the 2021 study group.

Peter Haenlein, CPTD

Meredith Fleming, CPTD

Lilliam Fourrodona

Lisa LeVerrier

Sonika Gondekar, CPTD

Kathy Herring, CPTD

Adriana Rodriguez

Katherine Knight, CPTD

Syed Mohammed Nurul Absar

Eleise Punow, CPTD

Margharita Nehme, CPTD

Jorel Rodriguez, CPTD

Glenda Mendez

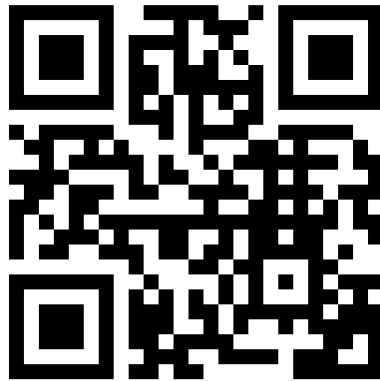
Keisha Harris, CPTD

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