



BB&T

Winston-Salem, North Carolina

Channeling Aristotle

BB&T creates a culture in which learning is everyone's responsibility.

Aristotle once said, "Excellence is an art won through training and habituation."

BB&T University has adopted this ancient philosophy as its own and has translated it into an approach known as Teach, Preach, Reach. Through that approach, the company conveys that learning and development goes far beyond the walls of its training centers and that employees and their managers are vital elements of the learning culture. The interpretation looks like this:

- **Teach** (training): BB&T University provides foundational and specific skills through courses, seminars, e-learning, and support materials.
- **Preach** (habituation): Local managers must be actively involved in their employees' learning by reinforcing what is taught in class.
- **Reach** (excellence): Through this combination of efforts, employees can reach their full potential.

All BB&T employees—nearly 31,000—have personal development plans. PDPs outline the employee's annual objectives, strengths, and opportunities for growth. Workers are formally evaluated twice yearly and informally coached on a regular basis in accordance with their PDP.

Its learning and development activity section specifies training opportunities to be completed during the coming year. Formal learning activities, knowledge bases, job aids, electronic performance support, and on-the-job learning are available to employees to satisfy these learning needs. Managers are trained and are required to suggest learning opportunities to remedy developmental needs.

Employees in 36 customer-facing roles are required to complete the University Certification Program—a comprehensive professional development program that guides employees through the self-paced acquisition of core knowledge, skills, and abilities for

their particular role. Managers track and oversee their progress. Certification requirements are in place for up to 60 percent of BB&T employees, who are given a 30-month timeframe for completion.

BB&T University was created in 1992, and Will Sutton, its manager, has been with the company since 1996. Sutton manages a staff of 133 learning and development professionals and reports to Tim Davis, the executive vice president of human systems. Sutton is also a member of the corporate senior leadership team.

The company takes a hybrid approach to centralization—what Davis describes as “decentralized decision making with centralized support.” BB&T University staff work in teams with specific areas of focus, such as sales and service training or leadership and professional development. In addition, there are technical trainers embedded into the lines of business.

The university uses a company-specific, five-step design methodology.



L-R: Tim Davis, Executive Vice President of Human Systems; Will Sutton, Manager, BB&T University

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– Will Sutton
Manager, BB&T University

This process fully embraces the ADDIE model and is a systematic approach to developing courses with specific, measurable outcomes. It is learner-centric and ensures that participants achieve defined goals. Furthermore, it allows university staff to ensure that a needs analysis is conducted and that measurement methods and follow-up procedures are defined and completed on a consistent basis for every new course.

BB&T’s leadership communicates the importance of learning to the organization by participating both as teachers and as learners. All of the members of executive management, as well as many members of the senior leadership team, have completed the company’s leadership development program. The LDP is an intensive, six-month program that focuses on banking knowledge, corporate culture, leadership, lending skills, and so forth.

“Leadership development is one way that we ensure the sustainability of organizational results,” says Sutton. “It’s how we continue to ensure that BB&T is a viable organization and that learning is a big piece of that.” The program proves its worth with results—the bank retains its LDP graduates at a rate 50 percent higher than that of direct hires.

Last year, BB&T University enhanced its leadership curriculum to support an executive priority on succession planning. The new curriculum allows managers to grow their

successors while tending to their own professional development. It stratifies leaders into three levels based on their leadership responsibilities.

Level 1 is for supervisors or team leaders who work under close direction of another manager. It focuses on topics such as leadership fundamentals, HR policy, cultural pieces of the leadership process, and diversity training. Level 2 is for managers of work teams and functional departments, who receive advanced leadership skill and total quality management training. Level 3 is geared toward managers of managers who are more strategically focused; it includes coursework on strategic planning and an intensive workshop providing 360-degree feedback and one-on-one coaching.

High-performance employees may apply to participate in BB&T’s Banking School. Developed in conjunction with Wake Forest University, it is the only proprietary program of its kind. The Banking School is an intensive program that comprises 140 contact hours over two years, including two week-long residential sessions at Wake Forest.

It is designed to move employees from a tactical understanding of their jobs to a broader understanding of the bank, the industry, and business as a whole. Of BB&T’s 33 regions, 14 have at least one Banking School graduate in a leadership position.

Sutton’s staff is also working to ensure sustainability by leveraging distance-learning strategies. Although he describes BB&T as a “traditional standup training organization,” the university is implementing e-learning as a way to cut development and travel costs and to extend the reach of learning.

For example, tellers previously were trained almost exclusively on the job. With an annual turnover rate nearing 30 percent for that frontline position, however, the need for training was nearly constant. Furthermore, says Sutton, “The training was only marginally successful and very inconsistent.” BB&T University targeted teller training as the appropriate venue for its first truly blended training approach, and launched the new program in June 2007.

The two-week program incorporates computer simulations, virtual classroom experiences, on-the-job observation, and classroom instruction. Each day begins with an interactive program that leads participants through tutorials and exercises on a laptop or workstation in the branch. These activities are overseen by a BB&T University instructor who reviews the employees’ performance daily and provides assistance to anyone who may need it.

During the first week, new tellers spend time observing experienced tellers and attending virtual classes. Utilizing the latest in virtual classroom technology, the instructor can divide the trainees into groups to discuss topics, call on individuals to demonstrate certain tasks, and demonstrate company-specific systems.

The second week of training involves using additional online exercises as well as working with a teller mentor on transaction processing. These teller mentors are certified by the university and are given a structured curriculum to review with the trainee. A final assessment tests proficiency and ensures that trainees are ready to work with clients.

To measure and report on the effect of learning across the enterprise, BB&T uses a program developed in-house called Measuring Training Effectiveness, which leverages Kirkpatrick’s four levels. Each University department has a designated person who collects all evaluation information and enters it into a database that generates comprehensive reports. Sutton reports on training activity to executive management at least twice a year. **T+D**



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