Thomson Reuters’ markets division has undertaken a client-training transformation that is in some ways a sign of the times and in others a bit ahead of them. In 2008, the organization decided to shift a function that relied almost entirely on client site visits to a model that would lean much more heavily on virtual technology and content.

Many learning organizations turn to remote technologies to save money. That is, of course, a valid reason, as the travel costs associated with site visits can get out of hand quickly, making it hard to offer training opportunities consistently or widely. But Thomson Reuters decided to use remote technologies for a different primary reason – to ensure continuous improvement of the client experience.

A big part of the impetus came from the creation of a new platform for users. This platform, dubbed Thomson Reuters Eikon, offers customers improved tools, as well as the ability to customize the way in which they monitor and view the company’s financial information products – from moment-to-moment updates on business news to thought leaders’ analyses of intertwining market forces. The interface also has features for community-building and collaboration across the industry. But its value would only be realized if clients received thorough training on how to use it.

Company leaders recognized that they could not deliver the necessary training efficiently through site visits alone. They needed a faster vehicle, but speed could not come at the expense of quality or client satisfaction. Early assessments of subscribers’ attitudes found that they had not had good experiences with virtual learning in the past.

Despite those obstacles, Thomson Reuters developed and implemented the Knowledge Network – a collection of live and on-demand virtual training options that has won over doubters and has better positioned the company for global growth.

This case study examines:

- How Thomson Reuters assessed the need for greater virtual capabilities and established the business case for change;
- How architects of the Knowledge Network worked their way through key decisions regarding technology selection, talent acquisition and development, and curriculum design;
- How decision-makers overcame resistance, built stakeholder support, and managed a transition that dramatically changed job descriptions and procedures across the organization; and,
- How the Knowledge Network is positioning the company for continued global growth without compromising the quality of client training.

Thomson Reuters developed and implemented the Knowledge Network – a collection of live and on-demand virtual training options that has won over doubters and has better positioned the company for global growth.
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Company Overview

Thomson Reuters is in the business of getting information and insights to people whose livelihoods depend on it, to help them make better decisions faster. The company provides up-to-the-minute news, research and forecasting to professionals who work in the news media, healthcare, law, scientific research, tax and accounting, and finance.

This case study focuses on Thomson Reuters’ markets division, for which clients range from traders and investor-relations specialists to venture capitalists, CEOs and other dealmakers. Through subscriptions, these people gain access to a wide array of products – from freshly mined raw data to steady updates on market-moving news, to analyses by industry thought leaders on recent events and their implications. Delivered to subscribers’ desktops, the content assists users with the decisions and advice they give to their own clients day to day, hour to hour.

Thomson Reuters is publicly traded on both the New York Stock Exchange (NYSE:TRI) and the Toronto Stock Exchange (TSX:TRI). It has headquarters in New York City and employs 55,000 people in more than 100 countries. In 2010, the company recorded more than $13 billion in revenue. While Thomson Reuters’ roots go back to 1799, its current incarnation was created in 2008, when Canadian publishing giant Thomson Corporation bought then U.K.-based Reuters Group PLC, a financial information provider and news agency.

The company’s most prominent rivals include Bloomberg and Dow Jones & Company. The firm works to differentiate itself not only by providing a wide range of high-quality information, but by continually improving the way in which it delivers that information and how it equips subscribers to use it.

Figure 1: Thomson Reuters at a Glance

- **Founded:** Originally in 1799, merged with The Thomson Corporation in 2008
- **Headquarters:** New York, New York
- **Number of Employees:** 55,000 in more than 100 countries
- **Number of Employees in the Markets Division:** 15,000 (approximately)
- **2010 Revenues:** $13.1 billion
- **Client-Training Budget for Markets Division:** $80 million
- **Stock Exchanges:** New York Stock Exchange (NYSE:TRI) and the Toronto Stock Exchange (TSX:TRI)

Business Environment

After the marriage of Thomson and Reuters, leaders examined the resources and structure of the company they had created – discerning how best to integrate departments to generate maximum business value. One decision they made was to create a central client-training function within the markets division. Client training before the merger had been a dispersed function, organized largely under regional supervision.

At the same time, the markets division was planning to launch a new user platform, called Thomson Reuters Eikon. The company designed Eikon to help clients in selecting and monitoring the information streams that are most valuable to them, in ways that fit into their fast-paced workflows. Much like a web portal in appearance, it is more interactive, engaging and user-friendly than anything offered before – with movable, resizable windows, as well as video, collaboration and professional-networking features.

Developing and implementing training to help clients make the most of Eikon became the client-training function’s first mandate.

Figure 2: Sample View of Thomson Reuters’s Eikon Interface


The Client-Training Organization

In determining how to structure the new client-training organization and to design training for Eikon, leaders at Thomson Reuters analyzed past staffing and practices. Some findings were positive. For example, training interactions had numbered at more than 500,000 yearly and client satisfaction scores were good; a third-party firm measured approval at 75 percent worldwide. But the methods used to achieve those ratings were not scalable for a global organization growing as fast as Thomson Reuters.

A major flaw, leaders felt, was that delivery relied too much on site visits. An estimated 95 percent of all client training during the previous two years had occurred at client facilities. The organization had 850 trainers and managers deployed in more than 120 locations worldwide, requiring a hefty budget, with more than 25 percent of that going toward travel and associated costs.

Cost aside, such reliance on site-based instruction was inefficient. Even the best traveling trainers, conducting both one-on-one and group training sessions, could reach only about 700 subscribers yearly. Most trainers were responsible for 300 to 400 subscribers. Leaders wanted to introduce subscribers to Eikon and get them up to speed much faster than that pace would have allowed.

As they studied the client-training value proposition, leaders also became increasingly aware that, as one executive put it,

"Trainers only know what they know and they’re only there when they’re there."

In other words, the in-person approach had serious drawbacks. If a subscriber’s schedule did not jibe with a trainer’s availability for site visits, or if a subscriber had questions that a particular visiting trainer could not answer, the value of the visits to that subscriber diminished substantially. Some clients (for example, those companies which were particularly small or based in fairly isolated locations) might not be visited at all. (See section, “Global Implications and Considerations.”)

Meanwhile, the menu of remote training options, which had the potential to put the same trainer in multiple places virtually at once, was underdeveloped and underused. That balance (or imbalance) struck leaders as being out of step with the times. A growing array of technology products was available to facilitate remote interaction, broadening the possibilities for rich, productive communication. The rising use of video instruction via such websites as YouTube suggested that people liked the convenience of on-demand learning. So why not shift the emphasis in client training to remote instruction and support?
Talent Challenges

Thomson Reuters’ aim was not to eliminate face-to-face training entirely. Still, the prospect of greater reliance on virtual training had important implications for how the markets division would assemble and develop its workforce going forward, as well as for how current employees’ duties might evolve.

From the start, leaders emphasized that the premise would work only if the company could build robust, client-focused virtual capabilities. This meant that people with the right technical skills would be necessary to build and maintain the appropriate infrastructure. The promise that fewer site visits would actually translate to stronger support would have to be kept.

Client trainers themselves would also have to adapt. Many had built their skills on the premise that they would be traveling to support clients in-person. A shift toward virtual training meant many roles would change substantially. While some trainers would continue site visits, fewer trainers would be necessary for this purpose – and their roles would become more specialized. Other trainers would need to learn to teach via virtual technology and video – an adaptation that leaders soon learned is not always easy. (See section, “Talent Acquisition and Development.”)

To help guide decisions regarding role changes, each member of the client-training organization took skills tests that assessed his / her expertise in various market specialties, such as commodities and energy, wealth management, and investment banking. These tests also assessed trainers’ aptitude for face-to-face and virtual interactions.

Ultimately, the number of training professionals within the division held steady, but the number of face-to-face trainers was reduced by 30 percent. The shift helped the organization to increase the overall number of client-training interactions by 41 percent. Thomson Reuters is proud to report that most people who lost training jobs found roles elsewhere in the company. Many had product knowledge and client relationships that made them a good fit for sales, for example. Leaders emphasize that the company’s primary goal never was to downsize; it was to ensure efficiency, continuous improvement and maximum value.

KEY POINT

Thomson Reuters reduced its number of in-person instructors, while keeping most of that expertise within the company. It redeployed many former trainers in other roles for which deep product and customer knowledge was highly valued.
Audience Analysis

Thomson Reuters used focus groups and various other techniques for analyzing clients’ expectations and gauging whether virtual offerings might fulfill them. Findings indicated that subscribers’ needs were well-suited to a virtual approach, but that their attitudes toward remote technology might present a challenge.

The markets division has hundreds of thousands of globally dispersed subscribers who speak different languages and live in different time zones. These professionals work in a wide range of roles with workflows that are highly variable and offer little downtime for classroom sessions. When they do submit to training, they expect it to be highly customized, and to cover both basic product functionality and specialized applications. The traveling trainers who had always served clients had to provide a wide range of information as quickly as possible, but one person can only know so much. Sometimes trainers had to leave questions unanswered, with a promise to supply a response later.

Virtual technologies carried the potential for Thomson Reuters to put access to the expertise of multiple trainers at clients’ fingertips anytime. This could include every trainer on duty and answering calls for help; if one trainer lacked a particular sort of expertise, he / she could transfer a caller to someone with the necessary knowledge. Customers could also access training materials prepared for on-demand use. Any number of trainers could contribute to such materials and review them to ensure maximum usability.

However, subscribers had expressed reservations about web-based training, perhaps because of poor past experiences, or a general reluctance to change processes or technology. For those environments in which people must constantly monitor, interpret and respond to volatile external systems of cause and effect (for example, the weather and its impact on commodities prices), it is natural to want stability in internal systems. To avoid any misconceptions and to ensure appropriate emphasis on ongoing customer intimacy, the company eventually banned the use of the word “remote” in references to the Knowledge Network, opting instead for words like “live,” “virtual” and “interactive.”

Thomson Reuters checked in on clients’ receptiveness to change in 2008 with a global effort to increase awareness and use of existing offerings. Results were encouraging. The portion of overall training that was delivered virtually rose from five percent to nine percent during the campaign. Client-satisfaction ratings held stable and, in some cases, were higher for remote sessions than for site-based training.

Also, subscribers began to express particular appreciation for training options designed for convenience. For example, they complimented the use of “just-
in-time” delivery, praising training that itself required only a few minutes and enabled subscribers to return quickly to their regular duties. However, offerings with these features were limited and not visually dynamic. For example, the division’s remote training at that time made no use of video. Leaders at Thomson Reuters knew from the beginning that they would have to provide more training in more robust formats to ensure maximum effectiveness and client engagement, to overcome any initial hesitation.

The chief architect for the Knowledge Network initiative recalled the care taken to make every decision customer-focused,

“Customers loved their trainers. So the notion that trainers wouldn’t visit anymore could be frightening. So we took care to emphasize that we would not be taking anything away; we would be augmenting something that was already really good … we wanted to make this and virtual experience as human as we possibly could.”

Figure 3: Thomson Reuters’s Messaging on the Transition to Remote Client Training

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<th>SWITCHED ON KNOWLEDGE NETWORK</th>
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<td>ANYTIME THAT SUITS THE CUSTOMERS</td>
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<td>DELIVERED AT THE CUSTOMER’S PACE</td>
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The Transition to Virtual Client Training

The next step was to craft a vision, both for the kind of best-in-class virtual training that Thomson Reuters wanted to provide and the kind of client-training organization that could deliver it. A project director was named and he assembled a core team of six direct reports to look at the challenge ahead from all perspectives. These people had expertise in front-line management, creative planning, team-building and communication, among other areas.

For the six direct reports, their tasks included research on how transitions to remote learning had proceeded elsewhere – in search of best practices. For example, the group looked at some of the work that Apple and American Express had done in client training via video. The group also partnered with Thomson Reuters’ information technology department and external consultants to ensure full consideration of different solutions and overall approaches. Other focus areas included talent acquisition and development, instructional design, and implementation strategies.

Technology Selection

Thomson Reuters decided that it had two primary technology requirements. First, the company had to be able to produce and distribute good-quality video. Second, it needed tools for delivering both live and recorded training remotely in a way that was reliable and highly engaging.

In deciding what products to use, the core client-training team partnered with the information technology team at Thomson Reuters to conduct an internal technology audit. This helped to determine what resources were already present within the company and which solutions to seek elsewhere. The team also enlisted external consultants to help assess needs and provide fresh perspectives.

Video Capabilities

Client-training leaders in the markets division considered three options for enabling video production:

1. Outsourcing;
2. Leveraging the production capabilities in the company’s media and marketing division; and,
3. Investing in division-specific production infrastructure.

Ultimately, they chose the third option. Client-training leaders deemed it too costly to outsource the initial production and updating of an entire catalog.
of video assets. Also, sharing resources with other divisions would have created scheduling issues, particularly given the speed at which the markets division wanted to develop video offerings.\(^3\)

Experts within the media division did, however, provide guidance on the design of recording studios for the markets division. The studios are essentially miniature versions of what the media and marketing divisions use. These include high-quality cameras and lighting, a full editing bay, remote-recording capability, multiple video sets, and “green-screen” technology to enable the use of various backdrops. The effect is quite like a TV newscast.

Thomson Reuters chose London and New York as the first studio sites and production hubs. The company plans to add less sophisticated studios at various locations globally to facilitate region-specific output and customization.

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**Figure 4: A Peek inside a Knowledge Network Studio**

Mini production studios for timely response to learner’s needs. Chroma-key “green screen” effect looks more like TV news.


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Virtual Communication Platform

Thomson Reuters submitted requests for proposals to different vendors. Key decision-makers whittled the field down to two frontrunners – Adobe Connect™ and WebEx. These providers met baseline criteria, such as being able to work with many types of computers and Internet connectivity. This was an important consideration, given that some subscribers are based in parts of the world in which the available technology is more limited than it is in others.

Finally, Adobe and WebEx competed in a runoff. Each had to create material, and present it to a group of testers from across the organization and around the globe. Thomson Reuters used a scorecard to ensure feedback could be compared, but the company also reviewed individual comments to ensure that insights and concerns would not be lost just because they did not fall into a predefined category.

In the end, Thomson Reuters chose Adobe, citing several reasons – including its Flash-based solution, which is less prone to connectivity problems, as well as being a better fit for how Thomson Reuters wanted to use video. For example, the company wanted the ability to mix and match pieces of video, reusing them in different learning packages. Testers also were impressed with how customizable and attractive the Adobe Connect™ interface was, with several commenting on its “wow” factor.4

Talent Acquisition and Development

Just as members of the client-training team did a technology audit, the company needed to take inventory of the client-training workforce.

- What specialized knowledge did different individuals possess that might make them crucial for a particular segment of clients?
- What languages did different people speak?
- Who had strong skills with multimedia technology?
- Whose personality translated well long-distance and whose did not?

These were the sorts of questions that had to be asked and some of the answers were surprising. For example, trainers who were known for their ability to engage audiences in person were not always able to communicate as well virtually. In person, eye contact, a firm handshake and a box of doughnuts can help to put a learner at ease. But when a trainer and learner are communicating by phone or a live webcam, a pleasing voice and active listening suddenly become more important.

The client-training team learned that there are particular skills associated with effective virtual communication. The team has helped some trainers to build those skills, but it is working toward a more systematic approach – developing classes and a certification program in remote communication.
Members of the client-training team also discovered that not everyone who can “wow” an audience in person can host an instructional video or news-style broadcast. The team ultimately decided to hire people with specialized experience to fill that need.

The chief architect for the Knowledge Network initiative recalled his surprise,

“Our early thoughts in terms of talent were that we’d use some of our terrific, terrific standup presenters. They’re awesome – I’ve been onsite with them and I can’t believe how well they relate to clients. But we took a couple of them and we trotted them in front of the camera, and it just fell flat. …When you see someone who knows how to do it, it’s like night and day. You just go, ‘Wow. That’s a professional.’”

At Thomson Reuters, as at other training organizations, the debate continues on whether it is more efficient to hire subject-matter experts (SMEs) and teach them communication skills, or to hire strong communicators and help them to acquire subject-matter expertise. Obviously, it is best to hire individuals with both sets of abilities, but such people can be hard to find. High-impact organizations must learn to make it a priority to identify these high-value individuals, keep them engaged and compensate them appropriately because they are also difficult to replace.

**Instructional Design**

Another area of debate for training organizations has to do with the speed of instructional design. Traditional instructional designers often make it a priority to develop entire programs of learning before allowing the learning to begin. Thomson Reuters did not want to wait that long. Its goal was to provide learning at the speed of need.

In other words, the client-training organization wanted the ability to release e-learning modules and instructional videos as they were created. The head of the function used a bricklaying analogy to explain the approach, likening individual instructional units to bricks. He posits that it is a modern learning organization’s job to provide the bricks learners need as quickly as possible, but the learners can stack those bricks however they see fit.

That is not to say a modern learning organization should not tend to matters of sequencing and other points of curriculum development. The client-training organization at Thomson Reuters uses instructional designers to group instructional units into topics, topics into courses and courses into
curricula – to offer guidance to learners on how they might want to proceed. The point is rather that learners in need should not have to wait for the whole before being able to access the parts.

Implementation

Thomson Reuters began deploying its new virtual client-training offerings to a small number of clients in October 2009 and expanded the pilot group in January 2010. The full launch occurred on September 20, 2010. As the rollout approached and progressed, trainers and other key players were invited to demonstrations of and classes on new video capabilities and the Adobe Connect™ platform.

The Knowledge Network

The beauty of Thomson Reuters’s virtual solution for client training lies largely in its multichannel approach. In this section, we describe the channels and how they complement one another.

The chief architect for the Knowledge Network initiative offered this description,

“As cool and compelling as video is, it’s sort of passive. You watch it, but you don’t interact with it. And as brilliant as e-learning can be, you’re all alone with your computer and it can also be easy for your attention to drift …. So our notion wasn’t to create one new standalone way to learn. Our notion was to create multiple channels for learning – video, live training, e-learning – and to use the elements that are really terrific in each delivery channel to buttress any weaknesses that might exist in the others.”

- **Knowledge Live** – Thomson Reuters’ subscribers who want to ask a specific question and get a real-time answer from an instructor on duty can do so, 24/7, through Knowledge Live. The company offered remote assistance before embarking on the Knowledge Network initiative, but Knowledge Live is more interactive. It uses Adobe Connect.

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Connect™ and webcam technology to put a face to the voice offering assistance. The system is also set up so that, if one expert lacks the knowledge needed to answer a question, he / she can quickly transfer the learner to someone who has the required expertise.

The chief architect for the Knowledge Network initiative explained,

"Say a junior banker in the Americas is working on spreadsheets for a meeting – he or she might be working at midnight or 1 a.m. If suddenly this person needed support or additional training on some functionality, under the old model they’d be dead in the water until the next day. But now, there’s very likely somebody in the Knowledge Network online in Asia, where it’s still business hours. So for us the catchphrase became, ‘We’re always on somewhere; come join us.’"

- **Knowledge OnDemand** – Subscribers can access bite-size online learning modules through Knowledge OnDemand whenever their schedules allow. Many modules incorporate video, reference current events and are designed to have the feel of a news broadcast. Learners may view only the modules that answer their most pressing questions or they may progress through multiple modules clustered under a particular topic.

- **Putting the Pieces Together: Where Site Visits Fit in Now** – Client visits are still a fundamental part of the client training and retention strategy at Thomson Reuters. Individuals who make such visits now simply have a different title – that of client specialist. They work alongside the Knowledge Network organization, primarily with Thomson Reuters’s largest, most complicated customers and in hub locations with a high population of users. Their role is typically more consultative than the role of trainer was. For example, rather than just teaching principles for navigating an interface or selecting information streams to monitor, client specialists look deeply into subscribers’ needs and workflows to analyze how they might use information more efficiently and effectively.

**Tools and Technology**

As mentioned earlier in this case study, the client-training organization conducted a technology audit, and consulted both internal and external experts in making technology decisions for the Knowledge Network. The products selected serve two broad needs – video production capabilities, and robust remote interaction and connectivity.
When the time came for Knowledge Network architects to present their choices and plans to executives, they let the technology sell itself. All updates were conducted using Adobe Connect™. As studio facilities developed, those were used, as well, to show how prepared videos would appear. This enabled senior leaders to experience firsthand exactly the sort of interaction that customers would experience.

In meetings, presenters made a point of not relying on slides that were dense with charts or other graphics to make their case. They used webcams and initiated conversations with executive audiences. This helped to demonstrate the face-to-face feeling that was possible with the technology. This convinced the decision-makers that virtual training could be just as engaging, in addition to incorporating the same kind of active listening and give-and-take interaction, as site-based instruction.

The chief architect for the Knowledge Network initiative described the result as an “ah-ha” moment,

“...It’s just a resounding thing when you experience it – even though I think when you first hear it, it sounds like, ‘Well, it can’t be as good; I’m giving something up.’ ...
That, by the way, has happened across the board – with our customers, with our training managers, our sales managers, anybody that objects or thinks they’re going to object. Once they experience it, they’re onboard. But you don’t win those arguments by showing a PowerPoint slide or giving theories, or even giving statistics.”

It is worth noting that the process of examining technology needs and the products which could meet those needs highlighted shortcomings in the organization’s learning management system (LMS). Thomson Reuters developed short-term workarounds, but expects ultimately to upgrade its LMS.

Communication and Change Management

Pursuing change that will affect an entire organization is in many ways a game of dominoes. The most efficient way to topple opposition is to start at the top. Client-training leaders found this to be true as they began pitching remote-training technologies across the organization. For example, resistance to using Adobe Connect™ tended to dissolve as soon as people learned that top executives were already using it to receive updates on the initiative. (See section, “Tools and Technology.”)
High-level support was particularly crucial, but the Knowledge Network is also an example of a program that could not have succeeded without understanding and support at all levels. Members of the core planning team recognized that, and sought input from stakeholders early and often.

For example, very early in the design stage, the team held a meeting in London at which all of the regional heads of client training brainstormed, whiteboarded and talked through concerns. Other stakeholder meetings followed in order to keep everyone briefed, as well as to solicit input. However, while it was important to gather that input and let strong ideas shape the program, it was also important to hold to certain guiding principles.

Core team members put it this way,

“If we had adopted every criticism and proposed alteration by every stakeholder group, the original vision would have been unrecognizable.”

Thomson Reuters’s efforts to gather and maintain stakeholder support for the Knowledge Network began during the design and continued through implementation of the program, but efforts will not stop there. The company has created a customer adoption function that is responsible for “selling” the Knowledge Network within Thomson Reuters and across the customer base. The head of the function was hired from the sales organization to manage messaging, drive an increase in training activities, and build engagement and awareness both internally and externally.

The new function builds implementation plans with customers, seeks feedback on the program, communicates successes and works to ward off any misconceptions. Such attention to change management is key to the long-term success of an initiative that requires the confidence of so many parts of the larger organization – from senior leaders to sales associates and helpdesk operators.

The chief architect for the Knowledge Network initiative noted,

“When you’re talking about a project of this kind of duration, you’ve got to remember that some of the leaders and stakeholders who buy in are going to leave, and there will be new people to win over … So I don’t think you can tell the story enough. Some people will get it the first go-round; others will need to hear it three or four times.”

Because people move in and out of a large organization over time, major change efforts require constant and repeated communication. The individuals working on a project later may not be the same set as those who started the project. Planners should find ways to build institutional memory.
Thomson Reuters did not see cost reduction as a primary goal for designing and implementing the Knowledge Network, but cost was, of course, a concern. Leaders estimated the price of delivering the program at $2.2 million. Savings generated through the program are more than canceling out that cost, given reductions in the travel budget.

The savings are expected to multiply as the shift toward virtual tools gains traction in other areas of the markets division. Senior leaders looked to the Knowledge Network team to establish the pathways and practices that sales and service departments could follow. The need to identify ways to make the approach viable for multiple functions likely slowed the design and implementation for the markets division, but was viewed as a time saver long-term.

Another area in which Thomson Reuters wanted to see improvement was reach. The Knowledge Network has helped the markets division to boost its client interactions by roughly 41 percent.

The company regarded it as particularly important that customer satisfaction remain the same or better than before the transition, at which time it had an approval rating of 75 percent. Today 83 percent of customers view the Knowledge Network training as “very good” or “excellent.”

The following samples of customer feedback gathered in June 2011 illustrate this satisfaction with the Knowledge Network.

“I found that, although it was remote, the webcam almost made it a live session. I could ask questions and that was fully interactive. All my questions were answered.”

Wealth Manager, U.S.

“The virtual training was very simple. It permitted me to connect to your learning specialist, and it is very useful and friendly also.”

Portfolio Manager, Singapore
"I had my reservations, when it was registered initially, that it was going to be remote training. However, to my surprise, whatever I asked (the virtual trainer) was able to show instantaneously as we shared desktops. It is almost like having the person around, by my side."

Analyst, India

Global Implications and Considerations

One of the most important and daunting challenges for companies today is figuring out how to staff for global growth. The experience of Thomson Reuters’s markets division is a solid example of how organizations can address that challenge by beefing up remote capabilities.

Following are a few ways in which the Knowledge Network better positions the company to serve clients on a global scale.

- **It Grants Clients in Isolated Locations Greater Overall Access to Training** – It is only natural for traveling trainers to focus first on destinations with a high concentration of clients. Destinations with a lower concentration of clients might get less frequent visits and solitary subscribers in isolated locations might never see a traveling trainer at all. But any client anywhere has access to training resources if he / she is plugged into the Knowledge Network.

- **It Increases the Reach of Individual Specialists** – Even clients in major world hubs might have difficulty scheduling a visit from a traveling trainer if that trainer’s expertise is particularly rare and in-demand. But if the trainer can help without traveling, his / her availability can increase significantly.

- **It Facilitates Collaboration among Trainers with Differing Areas Expertise** – No single trainer can have deep knowledge of every product in a catalog as extensive and diverse as that of Thomson Reuters. Similarly, no single trainer can know the intricacies of every industry, or the language, culture and geography of every spot on the globe that Thomson Reuters monitors or serves. So what if a client in New York needs help with a specialized application, in the context of a particular industry, and he / she needs that help delivered in, say, Japanese? The Knowledge Network enables different experts to combine their expertise and work with the client as a team, even if the experts are in different locations. To this end, it is crucial to take inventory of individuals’ areas of expertise and communicate them across the organization via expert lists or other referral tools. Trainers must know one another’s strengths in order to tap them.
• It Speeds Response Time When World Events Create Urgent Business Needs – If a major, market-moving event occurs in Israel, financial professionals worldwide are suddenly going to be seeking information and insights from the Middle East. The Knowledge Network allows these professionals to have far faster access to trainers than they would have if travel were necessary. It also enables Thomson Reuters to record training content specifically relevant to the event and make it accessible on demand.

• It Streamlines Language-Specific Customization of Training – Thomson Reuters strives to ensure that training is always available in a language which clients can understand. Decisions regarding how multilingual the Knowledge Network should be followed a study of client preferences with some surprising findings. For example, most clients said they were quite comfortable with English – a noteworthy exception being clients in Japan, where the use of Japanese is often a must. Still, subscribers who call Knowledge Live can get assistance in at least 15 core languages. The language spoken in on-demand content is generally English. Subtitles are available in the 15 core languages, but content planners were interested to learn that many international clients choose to see the text in English, as well. They find it easier to process the information when subtitles and audio are in the same language.

Best Practices and Lessons Learned

Throughout this case study, we have highlighted best practices that proved particularly valuable for Thomson Reuters, as well as lessons learned. This section summarizes a few of the most important.

• Get High-Level Buy-in and Commitment Early – Knowledge Network architects thoroughly demonstrated the need for and value of remote capabilities to senior leaders long before they imposed changes on the rest of the organization. This made it much easier to persuade leaders and employees at other levels to give new ideas a chance to succeed.

• Listen to Your Customers – Understand how customers learn – their specialties, their language requirements, and how changes in technology, social media and interaction should shape your strategy. For example, after making themselves aware of customers’ reservations about remote technologies, leaders at Thomson Reuters were able to address misconceptions, and ensure proper emphasis on quality and customer intimacy.

• Let the Technology Sell Itself – Knowledge Network architects did their due diligence in building the business case for remote capabilities, but they also recognized that facts and figures only go so far. To persuade
decision-makers that a remote training experience could be engaging and effective, they gave those decision-makers the experience – providing updates using the same technology which clients would use.

- **Think Carefully about When to Be Firm and When to Be Flexible** – As they gathered input from stakeholders on what the Knowledge Network could and should be, leaders worked to keep an open mind and make use of valuable ideas. At the end of the day, however, they accepted their own accountability and made the choices necessary to serve their vision.

- **Hire the Expertise You Do Not Possess to Supplement the Expertise That You Do** – Thomson Reuters used external consultants in several capacities during the planning and implementation of the Knowledge Network. For example, consultants assisted with the initial needs assessment, as well as with technology decisions. In a few cases, planners hesitated to seek outside help for internal experts and ultimately felt that hesitation wasted time.

- **Deliver and Redeliver Key Messages at Every Opportunity** – When managing an initiative that will require ongoing stakeholder support, it is important to provide ongoing communication. The customer adoption function has been key to building stakeholder support. Thomson Reuters continues to seek feedback on the Knowledge Network to ensure that it evolves in the ways which are best for the company and its clients.

**Conclusion**

Thomson Reuters’s transition from site-based client training to a virtual model was exceptionally bold, but carefully executed. Architects of the Knowledge Network painstakingly assessed the need for greater remote capabilities and methodically examined different technologies for meeting that need. They also gave due consideration to the reservations that both clients and colleagues had about the changes being proposed, and dismantled resistance through vigilant communication. The result is a client-training function that has positioned the company well for global growth and continuous improvement.
Appendix I: Topics for Discussion and Learning

The following sections will provide you with considerations for sharing and implementing the best practices that were highlighted in this report.

Key Learnings

Below is a list of key learnings (the “gems”) from this case study.

1. Thomson Reuters needed to evolve its primary model for client engagement to keep up with pace of today’s global business world. To do so, the company released a new, highly interactive knowledge platform, Eikon. Quickly, the company realized it also needed to evolve its primary model for customer training to match.

2. Thomson Reuters introduced the Knowledge Network, a combination of high-quality video learning nuggets, and available virtual courses and coaching, to provide global access to expertise whenever and wherever needed.

3. Supporting the Knowledge Network required the learning and development organization to rethink the roles of instructors and instructional designers, as well as the processes of instructional design and delivery. It was also necessary to rethink technology tools, such as those needed to produce video modules and deliver remote instruction, along with the LMS.

4. Changing from a predominantly face-to-face training model to one more reliant on virtual communication constitutes a major philosophical shift. Thomson Reuters engaged in significant change management activities throughout the project to ensure successful adoption.

Ideas for Action

Below is a list of actions that you can take in order to apply or implement the best practices highlighted in this report. These are some of the foundational elements that we highly recommend be in place inside your company in order to execute such a plan, process or program.

1. **Know Your Current State** – You need a good handle on existing processes and who owns them before initiating change in those processes. Otherwise, turf issues and ruffled feathers could hinder initial buy-in to any changes you seek to make, as well as the ultimate success of your efforts.
2. **Build Interest among Stakeholders Using the Technology** – Business stakeholders may not initially respond positively to the idea of a virtual approach. Customers also may have reservations to the idea of less face-to-face interaction. Use the power of the virtual platform itself to prove the level of engagement that is possible.

3. **Use a Pilot Project to Develop Internal Skills and Prove Results** – Choose one project on which to practice. Glitches and snags can arise in any first-time effort. Starting small creates an opportunity to adjust your approach, and provide a more tried, true and trouble-free process when the time comes for wider implementation.

**Questions to Consider**

Below is a list of discussion questions that you can ask your team, colleagues and business leaders, which will help you to take the next steps.

1. What collaboration tools or platforms are already in place in the organization?

2. Do we have the appropriate buy-in from senior leaders regarding a transition to a more virtual model?

3. Is the organization prepared in terms of its people (e.g., roles and skills sets), processes and technology to support virtual classroom and video-based learning?

4. How might we utilize the event recording feature of a virtual classroom platform as a means of developing self-paced e-learning content?

5. What change management efforts do we need to ensure the success of our transformation?
### Appendix II: Table of Figures

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