



“With” Strategy Not “For” Strategy with Lowell Aplebaum

Leading Learning Podcast
Transcript for Episode 289

Lowell Aplebaum (00:00):

We live in busy times, where we, of course, have 24 hours to do 36 hours' worth of things, certainly. But the places that, at least, I find that we have the strongest ties to, that we feel the most embedded, that we feel the most loyalty, that we feel the most like we belong are the places not where things are done to us or for us but the places where things are done with us.

Jeff Cobb (00:29):

I'm Jeff Cobb.

Celisa Steele (00:30):

I'm Celisa Steele, and this is the Leading Learning Podcast.

Jeff Cobb (00:37):

Welcome to episode 289 of the Leading Learning Podcast, which features a conversation with Lowell Aplebaum. Lowell is CEO of Vista Cova, a company that partners with organizations to support strategic planning, member engagement, and governance design. A Certified Professional Facilitator, Lowell frequently engages volunteers, stakeholders, and staff through experiential learning approaches.

Jeff Cobb (01:04):

Celisa and Lowell talk about leadership, strategy, journeys, hybrid going forward, inclusion as a silver lining from COVID, all kinds of mindsets (learning mindsets, incremental, and exponential mindsets), and the difference between doing things for those we serve versus doing things with those we serve. Celisa spoke with Lowell in December 2021.

Lowell Aplebaum (01:34):

I've been having a number of themed conversations, if you will, unintentionally, as I speak with organization after organization whose leadership is desperate to be heard. We have companies, we have organizations that feel like they have amazing value to share, amazing knowledge to share from a learning perspective, but, in this ever-noisy world, the challenge isn't in having, for them, the right value. The challenge is being able to have their members or their customers hear that value.

Lowell Aplebaum (02:04):

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode289.*

It's definitely the inquiry mindset, the idea of being curious, and not just a little curious, but having an inherent mindset, philosophy, and ethos, being radically curious about the member, the end user, the customer seems to be, I hope, something that will continue to shift how we approach each other, how we're able to therefore hear each other in an ever-noisy world.

Celisa Steele (02:30):

I like that notion of radical curiosity very much, and it, of course, seems to fit very well with a learning mindset as well. I think that curiosity often drives people to further their learning, deepen their learning. That feels very appropriate for the Leading Learning Podcast, to talk about radical curiosity. I know that strategy is one area where you've done a lot of work and tend to focus. Would you define or describe what you mean by *strategy*? And then maybe talk about some of the stumbling blocks that you tend to see when it comes to strategy, whether that's in setting the strategy or in carrying it out.

Lowell Aplebaum (03:16):

I love the question. I often say to leaders I'm working with that strategy is one of those meaningless meaningful words. You ask 10 people; you get 1,000 different answers. I think in the context of how a leadership entity—a board of directors or other level of governance—functions, then often being strategic is having the right balance of what I term as relevance in innovation, the right balance of where are we paying attention to the past and the present, the things, the actions, the investments we make that makes us relevant to our audiences versus innovation, the future we see, and how we get there.

Lowell Aplebaum (03:53):

Strategic is being well balanced in that. It's not an either/or. It's not two sides of a pendulum. It's really more of a flow. In general, I'd say, strategy and the idea that there should be some inherent central agreement that's not calcified, that's not sedentary but is a consistently, ever-evolving conversation of direction, that there's a unification in "Where are we going?" the strategy is the idea that, if we have the vision of where are we going, and we continue to explore that vision of possibility, the strategy is going to be that which guides us to make the right resource investment decisions, that which guides us to create the right cultural elements, that which guides us to seek the places of discovery and knowledge, which lets us make better informed decisions and have better discussions that leads us to that place.

Lowell Aplebaum (04:50):

Strategy isn't just a piece of paper with a set of metrics on it, though, of course, measurement of success is important. Strategy is an ever-evolving process, frankly, of learning, as we're talking about that, but then the inherent application of that learning to a direction that can see a greater accomplishment of a cause, of a mission, of a purpose, and of a future that you want to see accomplished.

Celisa Steele (05:13):

I like the focus on the fact that the strategy isn't calcified, like you're saying. It's more responsive than that, and this balance of relevance and innovation—the past-looking as well as the future, desired future state, involved there. All of that sounds wonderful. The second question, though, I'd asked was around where do organizations tend to get it wrong? Where do they tend to stumble in trying to come to this shared vision and this balance of relevance and innovation?

Lowell Aplebaum (05:47):

I think there's a few places where—I am inherently positive mindset, so I'm going to say there's a few places, rather than they stumble, there's opportunities for them to be a little stronger.

Celisa Steele (06:01):

I like the reframing—that's good.

Lowell Aplebaum (06:03):

I think part of it is that we don't do a great job always as we continue to cycle through leaders, in any of our organizations of just because a leader with some time and experience or perhaps is even present for the authorship of strategy, has this inherent assumption that a new leader coming on board, if you hand them a sheet of paper, they can live that strategy, that philosophy, that approach as well. I think there needs to be a shift in the idea of how do we create systems of learning and experience and exposure that helps build not just knowledge but skill sets and application in any leadership cycle, so that the strategy an organization has, as its ever-living conversation, is something that can be adopted, adapted, and put into place by each generation of leaders that comes in.

Lowell Aplebaum (06:57):

There's definitely a period there of training, of onboarding. The second place I'd say that there's an opportunity really to rethink about how we're more impactful when it comes to our strategy is when we think about, especially from an organizational context, a strategy is supposed to be something that helps advance a greater cause or a greater population or a greater membership, even, if that's the type of organization. Is the strategy in place to do something for a group or with a group?

Lowell Aplebaum (07:30):

More and more, we live in busy times where we, of course, have 24 hours to do 36 hours' worth of things, certainly, but the places that at least I find that we have the strongest ties to, that we feel the most embedded, that we feel the most loyalty, that we feel the most like we belong are the places not where things are done to us or for us but the places where things are done with us.

Lowell Aplebaum (07:57):

We go back to that curiosity mindset. Where we have said we want to be a part cares about our voice and seeks it, where it gives us opportunity, that, if we have interest, to have impact, to have influence, to have input. Strategy that works isn't just something that a central organization does in a bubble and then says, "Here's the results," but finds methodologies of visioning it, of implementing it, of innovating it, of evaluating it, that includes a more inclusive means to have, hopefully, many voices that find interest in that topic, in that area, to be a part.

Lowell Aplebaum (08:36):

Then the last thing I'd say about, in terms of we're going to go to, I think you said, "stumbling blocks," but I'll say, "opportunities" is, "How well known is it, what you're trying to achieve?" Ideally, a strategy is a different future you're trying to create and how you're going to create it. That's what we're talking about. Whether that's small, whether that's big, the idea is that there's

something today that has a greater potential for tomorrow, and what is going to be the path that gets us there?

Lowell Aplebaum (09:08):

That could be very tactical and quantitative. That could be qualitative. That could be impacting a small portion of a community. That could be impacting society. But, if that vision and the journey is not well known and if there isn't along the way an invitation mindset about "Join us on the journey," then the full potential of that journey is never going to be realized. You're always going to be deficient in resources if there isn't an invitation mindset to a greater population to be part of the journey, to walk it, to contribute to it, that you can continue to add resources of knowledge, of perspective, of experience, of finance, of time, along the way.

Lowell Aplebaum (09:51):

Now, I find too many organizations set the strategy, say "We're going to do the strategy," but then have a single silo view of, "That's what we are going to do as the central organization." No, that's what we are going to do as we look to build bonds of input, of invitation, and of alliance so that more of us can be on that journey together.

Jeff Cobb (10:13):

We have two offerings that can help you get your presenters and your internal team on the journey with you. To help learning businesses, Leading Learning offers a range of complimentary educational resources, including this podcast. Leading Learning's parent company, Tagoras, provides in-depth, customized consulting services to help learning businesses assess their markets, formulate strategy, and select appropriate technologies.

Jeff Cobb (10:37):

We've provided relatively little between these two options historically. In 2022, we aim to change that with the launch of two new offerings. If you're looking for a practical, concrete way to help your presenters to deliver more effective, impactful learning experiences, we have a course called "Presenting for Impact" that can help you do just that. If you're looking for a structured, intentional way to make your learning business perform better, the Maturity Accelerator Program is designed to help organizations effectively leverage the Tagoras Learning Business Maturity Model in a way that aligns with their specific situation and needs.

Jeff Cobb (11:12):

If you're interested in either or both of these professional development offerings, check the show notes for this podcast episode to learn more, or drop us a note at leadinglearning@tagoras.com. Learn more at [leadinglearning.com/episode289](https://www.leadinglearning.com/episode289). Now, back to Celisa and Lowell.

Celisa Steele (11:35):

You work with a lot of organizations, and I'm going to make the assumption that many of them have a component of what they do that is about education, professional development, lifelong learning, making that available. How have you seen that role of education and learning evolve within the broader organizational strategy for some of these organizations that you've worked with?

Lowell Aplebaum (12:03):

I think I've seen it evolve in a few different ways. The first is that perhaps, once upon a time, there was a time where you got certain pieces of learning from certain specific providers or organizations, and that was really their single domain. There's really been a proliferation of where providers of certain types of learning have said, "Well, if we're providing skill learning, perhaps we can also provide soft skill learning, right?"

Lowell Aplebaum (12:31):

A real expansion of opportunities and options in this space of what kind of learning is available. Organizations that once had dedicated audiences that came exclusively to them for the learning they offered, more and more are facing competition. That's not something that I find many organizations are built for, just yet—the idea that they have to compete in the learning space.

Lowell Aplebaum (13:00):

Because creating a positive learning experience, and really that's across the various audience segments, whether we're talking about for a general membership, whether we're talking about by a career stage, whether we're talking about for leadership, really is only first step, is having the right pieces of learning in terms of the knowledge that you want to transfer.

Lowell Aplebaum (13:22):

Thinking beyond that, from what I see organizations starting to think about now, is that having the right topics and the right substance within those topics is really a de minimis. That's a minimum threshold. Beyond that, do you actually have instructors that are not just wise in the topic but can express it in an engaging way, that have some base level of idea of how to be an educator, how to be an educator for an adult learning population?

Lowell Aplebaum (13:57):

Then, especially as we shift to greater platforms of virtual and to hybrid, how do we really create learning experiences that go beyond just what the subject matter is, that's going to engage the learner, that's going to make the learner want to come back, and hopefully learn more but is also going to hopefully start to shift learning from a place of check the box, I watched that video, to some demarcation of progress, to some demarcation that lets the learner be able to see, to perceive that there has been a shift in their potential.

Lowell Aplebaum (14:36):

I can give a very personal example. For instance, currently I'm in a doctoral program, and one of the courses I had to take, of course, in the program before you get the dissertation is a course on graduate-level statistics. I'm not sure that's the course I ever would've chosen to take, but here I am. What was amazing for me was to scan the curriculum, scan the learning that we were going to do over the course of eight weeks at the beginning and for part of the language to look like the Matrix. I'm like, I have no idea what half this stuff is. It's like all a jumble on the screen.

Lowell Aplebaum (15:08):

To emerge eight weeks later, perhaps not fluent yet, but I know what all the things are now. There's a tangible and very real sense that there has been an increase in vocabulary, in awareness and fluency that has shifted my knowledge, that has shifted what I bring to the table in a meaningful way.

Lowell Aplebaum (15:32):

If we're talking about a learning mindset for organizations about what we're seeing at this moment, all too often it's still about how do we throw a Webinar up there that someone will listen to you for 60 minutes, and that's success. As opposed to really trying to take on a learner mindset from saying and offer, "If you stick with us on this learning journey, let's show you where you start, and let's see if by the end or by a milestone, that you can see, feel, taste that you've grown, that you've shifted."

Lowell Aplebaum (16:04):

I'd be interested to hear from you. How much of the onus of learning—which is supposed to be a process not of providing information but of helping someone grow. Learning is for growth—thought growth, experience growth, applicability growth. How much is that responsibility of growth on the learner, and how much is that responsibility of growth on the organization providing the learning? I'd be interested—do you have thoughts around that?

Celisa Steele (16:32):

Well, my mind immediately went back to what you were talking about when you were speaking about strategy, this idea of it being with us not for or to us. I think that absolutely applies to learning, that it needs to be a partnership. The learning business that's providing the learning experience, that opportunity, there's significant work they need to do to hold up their end of the bargain. But the learner also has to come and engage and participate and put in the effort. And so it really is this partnership.

Lowell Aplebaum (17:05):

I love the partnership mindset, Celisa, because I think there's a few important things there. Are learning businesses, are they going to offer one-off learning experiences that perhaps are good for the bottom line and can be used as a resource library of plug-and-play? Sure. I'm not saying that's not going to exist. I'm not saying that for some audiences, that's not exactly...those could be great in time, momentary. How do I do this? Let me jump in and out.

Lowell Aplebaum (17:34):

If we're talking about, for the long haul, some building of a greater relationship of learning on a journey, then the concept of partnership you're saying has implications. Partnership means that, at the beginning of the journey, there's a few agreements that you have between those offering the learning and the learner.

Lowell Aplebaum (17:52):

You're saying, we're going to stick it out however long—four weeks, six weeks, eight, I don't know what the journey time period is, per se, those may be different—but we're going to stick it out together. We agree that, if we stick it out together, here's what we're hoping to achieve by the end of this journey, no matter how long the segment is.

Lowell Aplebaum (18:11):

And that, at a bottom line, some people are like, "Well, what I want at the end is a little badge I could put on my LinkedIn profile." Which is great, and that's one type of learning journey. But if we're talking about, in this day and age, where you can earn badges up the wazoo for paying 200 bucks each, what I think people are looking for, if they're willing to invest in the journey of

learning is what actually are they going to be able to demonstrate as a place of growth and achievement that allows them to tell a narrative of how they're able to make a greater impact, how they're able to bring a greater skillset?

Lowell Aplebaum (18:48):

I think part of the learning provider's offer has to not just be the knowledge transfer; it has to be how do you help the learner be able to demonstrate the knowledge they just gained in applicability? How do you help to make them aware and be able to tell the story of what that growth has been along the journey? I think that's different than just putting some readings up with some reflective questions. There's a different experiential aspect there. I think the most successful, constructed learning experiences I see are more holistic and care about the whole learner and not just the class they're taking.

Celisa Steele (19:29):

I absolutely agree. That whole learner point of view, in particular, really resonates because, if you're really thinking about the whole learner, it acknowledges all the other demands on their time and attention. It also encompasses the barriers that they're going to encounter when they try to apply or continue to deepen their learning on a particular subject. It also acknowledges what prior experience they bring to the learning experience and that they have past experience, current experience that is relevant and applicable. That whole learner point of view, I think, is very important.

Lowell Aplebaum (20:10):

I think there's organizational application to that as well. If we encourage the boards of our organizations to enter into service with a learning mindset. So often, when we come to any organization, their leadership is looking to come to a table to simply discuss and decide things. Which is limiting and limits the voices at the table and the perspectives they bring. It limits the robust inquiry and conversation that can happen, that can lead to better discussions and decisions.

Lowell Aplebaum (20:40):

But instead, if we were to set a mindset for leadership of organizations that actually we want you to be a learning board in the exploration of key topics where there's the potential to pivot or reinforce where an organization is going to make impact, before we get to decision, how do we utilize the varied perspectives and experiences in the room to learn from one another?

Lowell Aplebaum (21:04):

How do we think about what are the places of skill sets or points of view that would allow us to have a better discussion? How do we learn from them? Can we bring in subject matter experts by Zoom for five minutes to express their point of view so we can build our own learning? Learning is not perfection. It's a process of improvement, a process of growth. How do we not stick everything on every decision but have a more pilot mindset or have a more experiment mindset, have a greater mindset for leadership to be able to try things, to learn from those experiments, and then to make better decisions because of that?

Lowell Aplebaum (21:38):

That kind of iterative process is a different approach than just saying the judgment of success is by how well you decided things. Instead by saying the judgment of success is not just the

decisions you made but how the leadership of the organization and therefore the organization itself is on a continual improvement cycle by adopting a learning mindset, experimenting, learning, recognizing setbacks. What do we need to do differently? Reinforcing places of strength and passing that on from a generation to generation.

Celisa Steele (22:07):

It's walking the walk, right? As well as talking the talk. Absolutely. I feel like the COVID era has exposed some shortcomings in a lot of organizations. We've had this historic bifurcation of meetings and events on one side and education on another side. I'm curious about your thoughts around the ideal approach to meetings/events and then education as we go forward, as we move beyond, hopefully, the pandemic.

Lowell Aplebaum (22:47):

I'd say two or three things about this. The first is that—and I just don't think it is the years of transition into a pandemic era. At some point, many years becomes a time period unto itself. What's important is that at some point you need to transition from a crisis mindset to a strategic mindset, even if you're still in what's considered to be an ongoing crisis.

Lowell Aplebaum (23:13):

To that end, I'd say a few things to your question, Celisa. The first is that I see too few organizations that are not still trying to use quick-reaction methodology, which was needed at the onset of the COVID period but is perhaps not the wisest choice for this moment in the COVID period or the moments to come in the years to come. To instead say that we're offering more diverse types of learning opportunities than ever as we are shifting or have shifted to a virtual platform to now back to a live platform. We'll get into hybrid in a moment.

Lowell Aplebaum (23:49):

But, through all the versions of those platforms, of where are we actually coordinating what we're trying to offer and how we're offering it, if I could make one wish for a resolution each year for an organization to do, one of those wishes would be that they took the time to step back and say, "What's our content strategy? How do we know what those we represent need to know? How do we actually think from a place of intention, creativity, and experience how we offer those pieces across platforms?" So that places that are of key importance, we may offer the same content across multiple platforms in different modes.

Lowell Aplebaum (24:30):

There may be places that what's needed is a more advanced place of knowledge. So we're going to, in the next six months, offer intro to intermediate before, and then later in the year we can offer the advanced. We build towards that. But I don't see organizations mapping out the strategic approach to the content they want to offer and the platforms they're offering it in, rather than one-offs here with a meeting, one-off here with our learning platform.

Lowell Aplebaum (24:56):

Instead, if you check the box of how we covered the topics, sure, maybe we did, but were they in any way coordinated? Were they in any way integrated? Did they make the learning journey easier for the learner? I think too many organizations aren't stepping back for that. The second thing I would say is the shift in mindset of who the learning audience could be.

Lowell Aplebaum (25:18):

One thing that we've seen in this COVID era is that there's actually a greater potential for inclusion than ever because, all of a sudden, the thresholds of fiscal reality that would require someone to attend, for instance, a multi-day conference. It's so interesting—I hear organizations that are looking for, in terms of generational shift, to early-career participation.

Lowell Aplebaum (25:42):

Yet where they're providing most of the learning and the skill building they want that early career to participate in is at a conference. When you think about the populations that have the most latitude to take time off work, that have the most latitude in terms of familial obligations, that have the most latitude when it comes to their fiscal pockets and what they're making and what they have, you know which audience has the least of those things? That's not even considering the global implications that, even if there are national or local organizations, virtual offerings lower the barrier of having a greater geographical participation.

Lowell Aplebaum (26:23):

But what that means is that we need to think about how we're offering—not to take away from the power of in-person because, my word, we could talk all about relationship building experiences and how powerful they are—much of the strategic planning governance work I do is in person, for that reason. But, in terms of the learning opportunities and the integration between meetings and the integration between learning, how do we balance this moment of opportunity for actually market share increase by thinking about the differentiated audiences that our content could impact? And how do we create not subpar but actually excellent experiences as we prioritize those audiences across platforms?

Lowell Aplebaum (27:04):

One of the most disheartening things that I've seen is organizations, they're like, "Okay, so we've done virtual; we're going to go do hybrid now." But hybrid shifts back to an amazing experience for a limited population, in person, and then a secondhand experience, a spectator experience, for those that are tuning in virtually, after they've had a much more vibrant virtual learning experience out of necessity for the past year and a half. It's such a step back.

Lowell Aplebaum (27:31):

Part of that is the cost ratio of how do you do this all? But, if we're going to have a future-focused mindset, the concept that it's not just virtual, it's not just in-person, but that there's some integration of those two, and that hybrid doesn't translate to we have to do everything on both, but instead we have some content strategy that allows us to have a purpose for the content we're offering and a recognition of which populations need that content and then a decision of what are the right platforms to offer that content in the right way, that would allow these one-off things of "We're going to do this one in a meeting, this one on a Webinar, but never the two shall meet"—hopefully, those are things that start to get sunset.

Celisa Steele (28:13):

I think that's great. I definitely feel the same way around the intentionality that you speak of, having the content strategy, really thinking through what it is you're offering, and letting that drive the decisions about what happens online, what happens face to face, what happens in some mix of the two. That makes complete sense, both from the learning standpoint and the business standpoint, both.

Lowell Aplebaum (28:37):

How do you think organizations need to measure success of the learner today?

Celisa Steele (28:42):

I think if we take the partnership we were talking about earlier seriously, then there has to be a partnership in figuring out what the right metrics or the right way to measure success is. For a learning business, revenue is important, but I would not want to see that be the only metric from the learning business standpoint. I would think that impact would also be very important, meaning where are those successes in terms of the learner actually applying what they've learned, back on the job or at home, or in life more broadly.

Celisa Steele (29:27):

Then there's probably again—that if we take the partnership seriously—some aspect of really working with the learner to understand why are they engaging in this. Because hopefully it is beyond the checking a box to complete X number of hours in a given year. Hopefully they really are thinking about something beyond that. Maybe it's to improve the services that they provide to their own clients, patients, people that they touch, or to be able to move up to a higher-paying job. It could be all sorts of different things, but probably getting them to engage because they're going to know much more than the organization providing the learning why it really matters to them.

Lowell Aplebaum (30:13):

As you said that, I had...maybe it's an example, I'm not sure, but a thought come to mind. Recently, over the course of the initial part of the pandemic, USF, University of Southern Florida, their Muma School of Business offered this class, this online, multi-week class in, I believe it was, equity and inclusivity in the workplace.

Celisa Steele (30:36):

I took that one.

Lowell Aplebaum (30:37):

I did as well. It was sponsored by some big businesses, and it was free, right?

Celisa Steele (30:43):

Right.

Lowell Aplebaum (30:46):

They got in the end—there's definitely hundreds of thousands of people to sign up. I don't remember how big the number went, but I believe was over 100,000 in the end. So a significant population learning experience, shall we call that. As I was thinking about that, it was a topic that is, for certainly the right moment, of critical importance. Is success of that effort the numbers they got? Is success of that effort the number of people that didn't just sign up but actually completed it and earned the certificate? Is success of that effort that they went back a few months after and sent a question out, a poll out, or invested in some interviews to say, "How did this class actually make your workplace more inclusive or equitable?"

Lowell Aplebaum (31:40):

Is success of that effort not just those narratives, those testimonials, those stories of impact but that they then take that and say, “Okay, those that want to contribute, let’s have some design-thinking opportunity”? If this is a platform, the base—because they’re rerunning the class now, so there’s some foundational piece there—of those that love this learning and want the next step, what would the next step up be? What do you need to further accelerate? Is that what success is for the learner? It becomes not just a one-off journey, and each of those feel almost like tiered levels.

Lowell Aplebaum (32:17):

But through the context of that, there’s a magnitude there of potential for impact that feels like there’d be a great case study in how we define success for the learner, from a place of clear initial interest to how far down the line do we have definitions of success, so that it’s continual and growing, so that they’re reoffering the course now, someone who takes it in version two or version three that has these other layers built out, are they going to have a different layer of success? So it’s not just getting the certificate this time, but it’s going to be the other steps as well.

Celisa Steele (32:55):

That example, that’s a MOOC, a massive open online course, and we know historically those MOOCs just have abysmal completion rates. But then there’s the argument that does completion rate tell you anything? Because maybe someone was looking for the information, the knowledge, the skills that were covered in week two. They got exactly what they needed. They’re even out there maybe applying it, having radical changes in their own life because of that. Then that gets totally lost if you look only at completion rates.

Lowell Aplebaum (33:37):

I think that’s true. Look, I think this is part of what agreeing to what success is beforehand because there’s multiple factors, and that completion rate is one factor. But would I rather have 100 people that completed it but then forget it, or would I rather have 20 people that completed it but can tell me deep, moving narratives of how the completion has shifted their potential, the work they do, the impact they make?

Lowell Aplebaum (34:11):

I think it’s harder to define success afterwards. When you look after, you’re like, “Okay, this is what we got. That’s what we meant by success.” Is that really authentic? I’m not so sure. But that doesn’t allow for a growing mindset. You can’t say then, “This is what we were hoping for. Look what we got. Okay, what do we need to do better next time? What do we need to think about next time?”

Celisa Steele (34:43):

How do you think that different learning organizations—take, say an association and an academic institution—how do you think they can work together in partnership to maybe achieve some of these higher levels of success and impact that we’ve been talking about?

Lowell Aplebaum (35:01):

I was on a call last night, a kickoff call for an organization where we’re starting the strategic planning process with them. Actually, one of the board members asked a similar question. They were saying, of the possibilities of what we need to think about for the future, partnership feels

like a huge place of focus for us. Because if we're going to exponentially increase the potential we have for impact, we're only going to be able to do that if we look for sources of resource that are not only internal.

Lowell Aplebaum (35:31):

I appreciate the mindset of partnership, in terms of potential for where one plus one can equal three. What I find, at least at this moment, is that partnership has become a frame for, all too often, how can this benefit us rather than a frame of there's 100 different places we could partner, what are actually the right fit partnerships?

Lowell Aplebaum (35:56):

The hardest thing that leaders in any organization have to do is to not just say yes but to say no. An organization, between an association and university—an association could probably think of 1,000 different universities they could partner with. But the point isn't the magnitude of quantity; the point there is the magnitude of strategic quality.

Lowell Aplebaum (36:20):

As we think about what are the priorities we are trying to pursue in the current cycle of the next X months or years, who are the potential partners that are closest aligned to the future we're trying to create, and then how do we have meaningful conversations of what we would each get out of a place of agreement that would perhaps mean more work on both sides but would also feed into what each of us deem as a successful iteration of the future? That's not one size fits all. That needs to be hyper focused on why certain institutions or companies or other organizations are the right fit partner for this moment and an invitation for dialogue that you don't go in assuming that what you think is going to be the place of mutual benefit is actually meeting what they need.

Lowell Aplebaum (37:09):

Celisa, I feel like this goes back to radical curiosity except, instead of an individual mindset, we have an organizational mindset. The perception that I know what someone else needs, that the perception that I'm going to be able to articulate what someone else needs in language that's meaningful to them, I inherently think is false.

Lowell Aplebaum (37:34):

The radical curiosity needs to lead to structured and meaningful listening, so that a partnership emerges not because one person comes to the table and says, "This is what it's going to be." But because two organizations can have a blended narrative of the future that they could create together and what they're willing to risk to create that future.

Lowell Aplebaum (37:54):

Perhaps there's models that could be built, so that's not starting from scratch each time to start with but not the assumption because of what the partnership is with one org is exactly what's going to be with another org. Look, I think we could look at that even through—I know it's not learning—through a lens of sponsorship models. Just for those, the tier of pay-this-and-get-these-benefits.

Lowell Aplebaum (38:17):

More and more, you see people not wanting to be one size fits all. The relationships that are going to be long-standing are going to be the ones where an organization is able to say, "Tell us what the top needs are you have in the next year, and let's see how we make sure that what we provide can meet those needs." And that may change next year or the year after.

Lowell Aplebaum (38:38):

I think, if we look at partnerships between organizations and institutions of learning or between anyone in the learning space, I think the same is true. Is your goal for the next cycle of year, two years, three years, just simply the number of learners? Then we can help feed that. Is your goal for the next cycle to build a leadership pipeline? We want to form a joint program that's going to emerge with an initial class of a dozen to two dozen potential executive learning learners in the field that could have C-suite aspirations. Let's focus on that.

Lowell Aplebaum (39:10):

The places of mutual need leading to mutual potential, I think, is just as true between learning institutions and will come down to, hopefully, the partnership built on shared metrics of success that then can align to what resources each organization's willing to contribute.

Celisa Steele (39:27):

I think what you said probably gets to maybe part of why finding and creating these really valuable partnerships is so hard. Because it takes time to have those conversations, to not go in with your assumptions, to really listen to each other, and to somehow arrive at those commonalities where you do overlap on needs or potential.

Lowell Aplebaum (39:50):

I'll give you an example of a potential. There's a difference between an incremental and an exponential mindset. For instance, traditional organizations, traditional membership organizations define who belongs to the organization by a single factor of who pays dues. I understand there's a fiscal reality with that, and you want contribution in order to then say, affirmation that we're with you for this journey, and we want to continue to invest in it.

Lowell Aplebaum (40:20):

But what if organizations, especially as we think about their relationship with academic institutions because almost every organization, at least the ones that have a professional mindset are concerned about a pipeline. Relationships with academic or learning institutions is pretty ubiquitous, they want that. What if, instead of saying, the only way to belong our organization is dues, if instead there was some other factor that allowed for those that want to pay dues to pay dues and to have whatever the level of access to value is. But then to have a greater institutional affiliation mindset that would allow those that are in the pipeline, to allow those that are coming in to inherently have a tied relationship that the organization, instead of seeking one-off members here or there by ones and twos, could instead expand community by hundreds or thousands through places of organizational affiliation with those institutions.

Lowell Aplebaum (41:25):

What does that open in terms of places of a greater community of potential learners that can hopefully hear each other's voices and learn from each other? I'm not sure what all the models need to look like. It needs to be customized. But I do think that, if we're thinking about what is possible in the years to come is, if we can, especially in this period of disruption, where much of

the places that we have held as tried and true forever have been put into light to say, “Is this really the way things need to be structured?” There’s the potential, at this moment, for an exponential mindset that I think could advance us beyond just incremental successes.

Celisa Steele (42:03):

What advice do you have for organizations that are in this business of continuing education, professional development, lifelong learning? What advice do you have for them to help ensure that they’re going to be able to thrive in the coming year and even beyond?

Lowell Aplebaum (42:20):

The advice I would have is to prioritize the experience of learning as highly as you value the quality of content. That, if you are rigorous in how much you are vetting the quality of the content you’re providing, which I hope they are because if you’re providing bad content, I’m not sure how long you’re going to be around.

Lowell Aplebaum (42:42):

Let’s say that they’re providing great content. How much is user experience testing actually a part of the process as well? How much is their investment in capturing the user experience and journey? How much are they actually structuring to have some, before the learning starts, a number of key conversations of what do you expect? Then come back at the end to those same people and say, “What did you experience?” So that the gradation of success is not only the number of people that go through the course, not only the number of people that complete it, but also the qualitative of what was the experience of the learning journey, did it make impact?

Lowell Aplebaum (43:17):

I think that that brings about a different mindset of what success looks like and could really elevate not just the quality of the information or knowledge to transfer but the impact of that knowledge and that transfer can make and therefore the reputation of who that company is.

Celisa Steele (43:32):

Before we officially wrap up, I just want to say, is there anything that’s come to mind that you haven’t had a chance yet to voice, anything else you’d like to say?

Lowell Aplebaum (43:40):

I think that the last thing I would say is this. If you’re listening to this and somehow fitting in the time to listen to this, which is wonderful, but, if the mindset you see of the people you’re working with and the people that serving through crafting meaningful learning experiences, through crafting meaningful learning journeys is ones of tired and exhaustion from just the overwhelming nature of the world as it exists at this moment, it’s an opportunity for a little grace and space to give everyone a little bit of care.

Lowell Aplebaum (44:15):

I hope that in the great value that we are able to produce as companies, no matter what our mindset or purpose is, that there’s a greater empathy and priority of care that we give to those that work with us as well as those that we’re working for. Because I think a greater empathy of care and a curiosity mindset would help improve our world and culture across the board.

Jeff Cobb (44:49):

As CEO of Vista Cova and a Certified Professional Facilitator, Lowell works with senior leadership to develop the skills of visioning and foresight and to set priorities and goals. You can learn more about him and his work at vistacova.com, and he welcomes connecting with you on LinkedIn.

Celisa Steele (45:06):

As I hope you heard, Lowell is thoughtful, insightful, and genuine, and I know he enjoys connecting with others so we can learn together as we look to create a better future. At leadinglearning.com/episode289, you'll find links to the Vista Cova site and Lowell's profile on LinkedIn as well as full show notes, a transcript, and other resources.

Jeff Cobb (45:29):

You'll also find options for subscribing to the podcast. To make sure you don't miss future episodes, we encourage you to subscribe. Subscribing also helps us get some data on the impact of the podcast.

Celisa Steele (45:41):

We'd be grateful if you would take a minute to rate us on Apple Podcasts. Jeff and I personally appreciate knowing there are others on this learning and leading journey, and reviews and ratings help us show up when people search for content on leading a learning business. Go to leadinglearning.com/apple to leave a review and rating.

Jeff Cobb (46:00):

Lastly, please spread the word about Leading Learning. At leadinglearning.com/episode289, you'll find links to connect with us on Twitter, LinkedIn, and Facebook.

Celisa Steele (46:11):

Thanks again, and see you next time on the Leading Learning Podcast.

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