

# Learning Partnerships in Organizations



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**In 1887, the parents of a seven-year-old girl approached Anne Sullivan with a seemingly impossible request: teach our deaf-blind daughter to speak, read, and write. By attuning to the girl's interests and needs, and spelling words out on the palm of her hand, within six months Sullivan had taught the girl 575 words, some multiplication tables, as well as the Braille system. It was the beginning of a 49-year learning partnership. That seven-year-old girl, Hellen Keller, would go on to become the first deaf-blind person to earn a bachelor of arts degree. She also published a total of 12 books and several articles, and became an outspoken political activist. This is what can happen when two people partner with each other for the sake of learning and growth.**

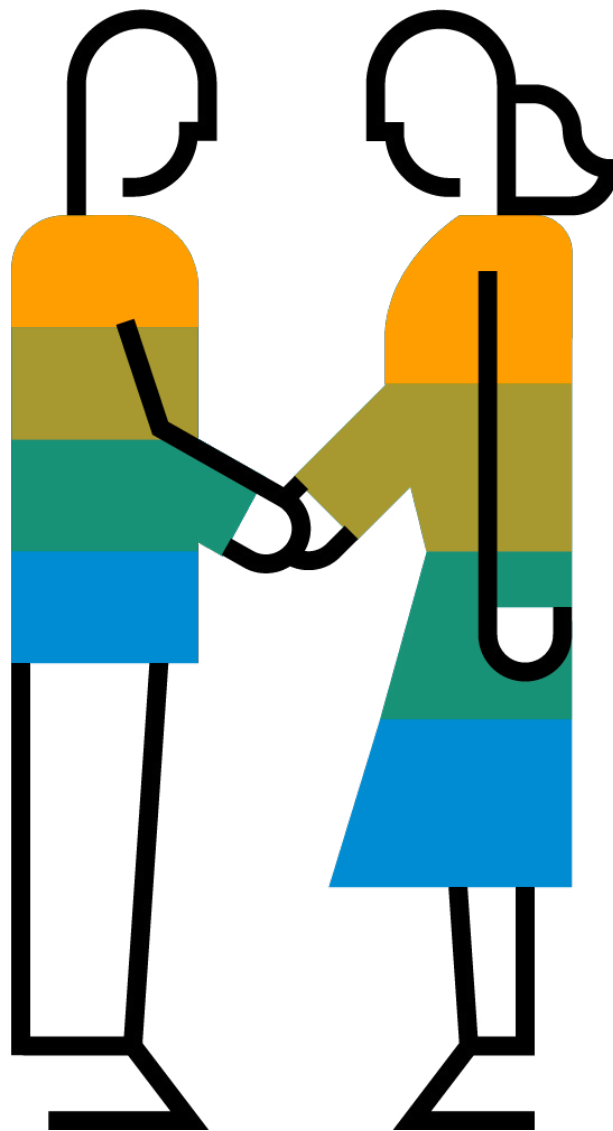
# Introduction

When organizations speak about development there is a tendency to assume this means training programs. In 2012 alone, US organizations spent approximately \$164.2 billion on formal training for their workforces<sup>63</sup>. While formal training is certainly important, it is not the only path to development. Learning partnerships represent another method for development that is often far more effective and much less costly than formal training. People are social creatures and one of the most natural and impactful ways we learn is by pairing up with another person to share knowledge, experience, and emotional support<sup>64</sup>. These partnerships are also cost effective since they require little to no operating costs and are usually embedded into work itself, unlike training programs that often take people away from work.

A learning partnership is defined as *an established relationship between two people to support learning and growth of one or both partners*. Such relationships are not new to organizations. For example, career mentoring programs have existed within companies for decades. But traditional mentoring programs represent just one of many types of learning partnerships that can be created within organizations. This paper discusses several of these learning partnerships, the value they provide, and guidance on how to create and manage them to maximize their benefits. Before addressing specific types of learning partnerships, we first describe four basic steps to make learning partnerships work at a general level. We then discuss six different types of learning partnerships. And last, we discuss the role technology can play in the establishment and maintenance of learning partnership programs.

“Everyone you will ever meet knows something you don’t.”

Bill Nye



# Steps To Make a Learning Partnership Work

Learning partnerships are powerful tools for development because they enable and support employee growth in multiple ways. This includes providing constructive feedback, emotional support, knowledge and skills sharing, access to career building relationships, enhanced employee socialization, cultural adaptation, and increased motivation, to name a few. But establishing the partnership alone is not enough to realize these benefits. An effective partnership requires thoughtful planning and consideration. To create an effective learning partnership, consider the following steps:

## 1. Define learning partnership goals.

Before establishing any sort of learning partnership, it is important to clearly articulate the purpose and goals of the relationship. This means addressing questions such as “What should people achieve or gain by investing time in the partnership?” or “What does success look like?” While it is important to have clear goals in mind when establishing learning partnerships, these outcomes do not always need to be highly specific. Some learning partnerships may focus on partners acquiring specific knowledge or skills, while other may emphasize more ambiguous goals such as providing emotional support or general career advice. Whatever the outcome, it is important that both members understand the ultimate reason for the partnership.

## 2. Ensure appropriate partner fit.

Once partnership goals and expected achievements are outlined, it is important to ensure an appropriate match between learning partners. For example, pairing a person hoping to master a new skill with someone who already possesses that skill. In addition to matching skill deficiencies to skill proficiencies, learning partners should also evaluate other fit characteristics like learning

styles, personality fit, and schedule compatibility. For some partnerships, it may make sense to match people based on individual differences as well as similarities (e.g., intentionally pairing partners who have different work or social backgrounds yet share common social interests).

## 3. Clarify roles.

It is important that both partners know what they must do to help achieve the learning partnership goals. This includes time commitments and the kinds of contributions they are expected to make to partnership discussions and meetings. Some partnerships may last weeks while others may last years. In cases of longer partnerships, the nature of people’s roles may change over time and it may be useful to occasionally examine and redefine roles on a periodic basis.

## 4. Establish a learning partnership plan.

After defining the goals and outcomes of the learning partnership, evaluating partner fit, and clarifying roles, the partners should collaborate to define a plan for how the partnership will realize its goals. For example, how often will partners meet, what actions will each partner commit to taking on behalf of the partnership, how will success of the partnership be measured, and when will the partnership be concluded should all be addressed. Conversations should also focus on identifying potential barriers or anticipated road-blocks and creating a plan to deal with them should they arise.

These four steps are critical to the success of all learning partnerships. But the details of how each step is completed may vary considerably depending on the type of learning partnership. In the remainder of this paper we discuss each of these steps in the context of different types of learning partnerships.

# Different Types of Learning Partnerships

The goals and outcomes associated with learning partnerships can be as diverse as the individuals who form them. Most company-designed learning partnership programs can be placed into a few general categories. Table 1

lists six learning partnership categories that are found in many organizations and the types of partnership roles they involve. Each of these has its own characteristics, requirements, and benefits.

**Table 1.**  
**Different types of learning partnerships and roles**

Career mentoring	Mentor: person with considerable career experience Protégé: person earlier in their career seeking development
Transition and socialization	Newcomer: person starting a new position and/or joining the company Veteran: person with existing experience with the position or company
Skills development	Expert: person possessing specific skills and capabilities Novice: person seeking to learn new skills and capabilities
Intergenerational	Older: person from an older age generation Younger: person from a younger age generation
Diversity mentoring	Mentor: person from specific demographic group with more career experience Protégé: person from specific demographic group with less career experience
Health and well-being	Health partners: two people sharing similar fitness goals

# Career Mentoring

Career mentoring learning partnerships are primarily targeted toward career development. In these partnerships, an employee who is more experienced and knowledgeable supports the development of a less experienced and knowledgeable employee<sup>19</sup>. The experienced employee is traditionally referred to as the “mentor”. The less experienced employee is usually referred to as the “protégé” or “mentee”.

Career mentors fall into two categories. Internal mentors are people who work in the same organization as the person being mentored. External

mentors are people who work in a different part of the organization, and in some cases may even work outside of the company<sup>28</sup>. Internal mentorships are particularly effective in helping people navigate and build skills needed within the organization. Internal mentors are typically more accessible for in-person conversations and tend to have better understanding of the protégé’s work environment and culture. But external mentoring relationships also carry certain advantages. External mentors may be in a better position to provide long-term career intervention and lateral transitions to their protégés. They are also more

**Table 2.**  
**Benefits of Career Mentoring Learning Partnerships**

## Benefits for Protégés

Career outcomes <sup>20, 30, 31, 32, 38, 39, 40</sup>	Mentoring is strongly associated with positive career outcomes such as compensation levels, promotion, and career success. In one study, 25% of mentored employees received a salary increase compared to 5% of the employees in the same setting who were not mentored. Mentored employees have also been found to be promoted five times more often than non-mentored employees. <sup>20, 30, 31, 32, 38, 39, 40</sup>
Career satisfaction <sup>20, 42</sup>	Mentoring has been shown to improve employee attitudes toward their work and their employers. In one study 82% of mentored employees reported positive job satisfaction compared to only 64% of non-mentored employees. <sup>20, 42</sup>
Employee commitment and retention <sup>20, 34, 36, 22, 23, 24, 25</sup>	Mentoring is associated with employee retention and commitment. Being part of a mentoring relationship can decrease the odds of turnover by 38% <sup>25</sup> . In a survey of newly hired sales reps, those who were part of a mentoring relationship reported significantly higher organizational commitment and lower intention to leave the organization than non-mentored respondents <sup>23</sup> .
Employee engagement <sup>21, 34, 35</sup>	Employees in a mentoring relationship show significantly higher engagement scores than non-mentored employees. On average, mentoring has been shown to result in a 66% increase in employee engagement.



likely to be immune from internal organizational dynamics and can offer the protégé a source of confidential, objective advice<sup>17</sup>. Removing concerns about internal political risks can make protégés more comfortable asking important questions and mentors more comfortable providing candid, transparent answers<sup>43</sup>.

The benefits of career mentoring have been well documented; a recent breakdown of more than

150 studies on mentoring found that more than 90% of mentoring programs reported positive outcomes<sup>41</sup>. Table 2 lists some of these benefits. Like most learning partnerships, the benefits of a mentoring relationship are not limited to just one member.

The following are a few key tips to keep in mind when going through the four steps of establishing career mentoring learning partnerships:

**Table 2 continued**

**Benefits for Mentors**

Organizational commitment <small>26, 34, 39</small>	Employees who act as mentors tend to have stronger levels of organizational commitment. Retention rates are 20% higher for mentors (69%) than non-mentors (49%). Part of this is undoubtedly because more committed employees are more likely to volunteer to act as mentors. But it is also likely that being a mentor increases an employee’s sense of connection to their coworkers and company.
Career success <sup>26, 38, 39, 40</sup>	Being a mentor appears to be good for one’s career. Studies have found that mentors are promoted six times more often and are approximately 20% more likely to get a raise than non-mentors. Part of this may be due to a tendency for more successful leaders to be asked to mentor others. However, the act of mentoring also helps a person build work relationships and develop organizational insights that make them more effective employees.
Career satisfaction <sup>26</sup>	People who act as mentors report higher levels of satisfaction with their work overall. This aligns with other research that shows people tend to feel better about themselves when they have opportunities to help others.
Status and credibility among peers and supervisors <sup>27</sup>	People who act as mentors tend to garner respect from others in the organization for their commitment to supporting the career success of others. In addition, mentors often receive “reflective credit” for the career successes and positive performance of their mentees.

### **Step 1. Defining partnership goals.**

Career mentoring partnerships will be more effective if they are tied to specific business outcomes<sup>44</sup>. Some common business goals for mentoring programs include increasing retention of employees, accelerating the career development and promotion of high potential leaders, and increasing workplace engagement. Mentoring partnership programs will ideally have specific metrics or performance indicators that can be used to track their success. Common metrics include protégé retention and engagement and career advancement of mentors and protégés, as well as satisfaction ratings provided by mentors and mentees regarding the program itself.

### **Step 2. Matching partners.**

Career mentorships are defined by matching a more experienced partner with a less experienced person. “More experienced” does not necessarily mean older or more senior. For example, younger employees may be asked to share their knowledge about new technologies with older employees who may not have used these tools before (see Inter-generational Learning Partnerships for more information on reverse mentoring). What’s important is that the mentor is someone who has experience that the protégé can learn from.

Research has identified several other matching factors that impact the success of mentoring partnerships. Mentoring partnerships tend to be more successful when there is a match between mentor and protégé personality<sup>48</sup>, learning style<sup>47</sup>, values<sup>46</sup>, and belief structures<sup>46</sup>. Some studies

show that mentors and protégés who are similar on two key personality traits — conscientiousness and openness to experience — experience 25% higher promotion rates than control groups<sup>53, 55</sup>. As will be discussed in greater detail in the Diversity Learning Partnerships section, having mentors and protégés share the same gender and/or race can also be beneficial<sup>45</sup>.

### **Step 3. Clarifying roles.**

In general, career mentors perform three types of roles<sup>27</sup>.

- Coaching: Coach, challenge, and guide the advancement of their protégé
- Career support: Identify or create opportunities for protégés and when necessary protect them from ‘adverse forces’, such as “dead end” job assignments or harsh interactions that might hinder their success<sup>33</sup>.
- Social support: Provide personal support, friendship, counseling and role modeling.

It is important to clarify the degree to which mentors are expected to perform each of these roles and to ensure mentors have the skills to perform them effectively. For example, do mentors know how to provide constructive feedback to their partners? Are mentors empowered to intervene on the behalf of a partner to address workplace issues that are impacting their careers? Part of establishing a mentorship partnership is communicating what mentors are expected and able to provide to the partnership.

**Step 4. Defining learning plan and strategy.**

Mentoring partnerships are more successful when the mentor and protégé set clear expectations<sup>48, 58</sup> and agree on the level of commitment<sup>48</sup> expected from each partner. The learning partners should discuss the expected frequency and length of meetings, meeting agendas, and commitments to action between meetings. They should also define a date for reviewing, ending and/or renewing the partnership. Although there are no hard and fast rules, most mentoring partnerships involve monthly meetings (rather than weekly or every few months)<sup>58,61</sup>. Mentoring experts also suggest having frequent face-to-face contact and contact early in the relationship<sup>58, 61</sup>. Research also suggests that having a written set of guidelines and expectations in place<sup>58, 59</sup> is predictive of mentoring program effectiveness<sup>58, 62</sup>.

For additional information on establishing workplace mentoring partnerships, we recommend the following sources:

- Allen, Tammy D., Lisa M. Finkelstein, and Mark L. Poteet. *Designing Workplace Mentoring Programs: An Evidence-Based Approach*. Chichester, U.K.: Wiley-Blackwell, 2009. Print.
- Allen, Tammy D., and Lillian T. Eby. "Best Practices in Workplace Formal Mentoring Programs." *The Blackwell Handbook of Mentoring: A Multiple Perspectives Approach*. Malden, MA: Blackwell, 2010. 345-64. Print.
- [http://www.catalyst.org/system/files/Making\\_Mentoring\\_Work.pdf](http://www.catalyst.org/system/files/Making_Mentoring_Work.pdf)
- <http://www.inc.com/guides/2010/04/start-mentoring-program.html>

# Transition & Socialization Partnerships

Many companies use learning partnerships to help new employees adjust to joining the organization and/or to help existing employees transition into different jobs or roles. These involve pairing an employee who is new to the job or organization (the “newcomer”) with another employee who has experience with the organization or the job (the “veteran”). Transition and socialization learning partnerships are often incorporated into onboarding programs for newly hired employees or job transfer programs for ex-

isting employees. They may also be used as part of post-merger integration programs where employees from an acquired company are paired with employees from the acquiring company.

Transition and socialization partnerships help employees adapt to new workplace cultures, learn new work procedures, understand new job roles and expectations, and develop relationships with other members of the organization or group. These partnerships are particularly useful for

**Table 3.**  
**Benefits of Transition & Socialization Partnerships**

**Benefits for the mentee**

Organizational Commitment <sup>66</sup>	Employees who participate in socialization and transition partnership programs are significantly more likely to stay committed to their organization following a job change.
Reduced Work Stress <sup>2</sup>	Employees who participated in socialization learning partnerships reported less stress overall compared to employees who went through similar transitions without a partner.
Increased Confidence <sup>66, 67</sup>	Employees who participated in a socialization learning partnership during a career change reported higher levels of self-confidence than peers who went through the same changes without a partner.
Role Clarity and Job Understanding <sup>66, 68</sup>	Employees participating in socialization learning partnerships report having increased clarity surrounding what is expected of them in their new jobs when compared to those without a mentor. They also report significant increases in access to vital information and feedback necessary to thrive in their new role.
Stronger Work Relationships <sup>2</sup>	Employees participating in socialization partnerships report increased feelings of social acceptance and more positive workplace relationships.
Job Performance <sup>2, 66, 67</sup>	Employees who participate in socialization and transition learning partnerships tend to reach higher levels of job performance faster than other employees going through similar job changes.

people going through major transitions such as joining a new company, moving into a significantly different type of job (e.g., being asked to lead a new team or transfer to a new part of the organization), or being integrated into a larger organization following a merger.

Table 3 lists some of the benefits associated with transition partnerships. Most of the research on socialization and transition partnerships has focused on benefits for the organization and/or the employee undergoing the change (e.g., newly hired employees). Consequently, Table 3 only lists these benefits. It is likely that the other partner will also gain benefits similar in nature to those associated with workplace mentoring, as listed in Table 2.

The following are a few tips to keep in mind when going through the four steps of establishing transition and socialization learning partnerships.

**Step 1. Defining partnership goals.**

Transition and socialization learning partnerships usually focus on one or more of the following goals: providing role clarity and defining job expectations, adopting to workplace culture including learning workplace norms, procedures, policies, and practices, supporting social integration, and building relationships with other employees. Other goals may include increasing a newcomers' level of self-confidence or reducing the stress associated with transitioning to a new organization or job. Think about which of these goals are most valuable for the partnership and clarify what actions need to take place during the partnership to support them. If a goal is to help employees build work relationships, then structure the partnership to include more social activities. If a goal

is to help newcomers' understand the company culture, then think about activities that will help them learn the organization's underlying norms, values and beliefs.

It may also be useful to contrast the goals of transition partnerships from the goals of job training programs. Job training is focused on giving people specific knowledge and skills needed to perform their work. Transition and socialization partnerships focus on helping people understand how they are expected to work in the new organization and to build connections with the people they will be working with.

**Step 2. Matching partners.**

The main purpose of transition and socialization partnerships is to help employees adjust to new roles and organizational settings. This is done by creating a partnership between the new employee (the "newcomer") and an existing employee (the "veteran"). It is important that the veteran be someone other than the newcomer's formal manager. Pairing newcomers with veteran employees that they will work with, but not who they work for, enables building relationships solely focused on supporting the transition of the newcomer to the new role and organization. This is different from directing the newcomer's work responsibilities, which is the job of their manager. Transition and socialization partnerships also provide newcomers with relationships where they can discuss topics about their new job and company that they might be uncomfortable expressing to their formal manager.

If one of the goals of the partnerships is to help newcomers rapidly acquire information about their job, organization and work group, it is

important that the veterans in the partnership have a firm grasp of what information is most relevant and how to access it. Veteran employees should be socially connected within the organization and have a strong understanding of workplace norms, policies, and procedures. They should also have a general understanding of the newcomer's job and role expectations. But the veteran employee does not necessarily need to be highly familiar with the technical aspects of the newcomer's job, particularly if job specific information and technical knowledge can be covered by the newcomer's manager via training programs or by other work colleagues.

A frequent assumption when matching partners for socialization and transition partnerships is to pair newcomers with veterans who are long-tenured employees. However, this may not always be the best strategy. As employees stay in roles for longer periods, much of their job knowledge and behaviors becomes routinized and habitual. It may be difficult for longer tenured employees to empathize with the stress of a job transition, or recall what information is most relevant. For these reasons, an ideal match for a newcomer is often someone who has been with the organization for more than a year or two, but not so long that they have largely forgotten what it was like to join the organization for the first time.

### **Step 3. Clarifying roles.**

One of the defining characteristics of transition and socialization partnerships is their limited duration. These learning partnerships are focused specifically on helping people move into a new job or organization. As such, they should have a clearly defined trajectory and timeline. There is a greater need for information, support, and contact in the beginning of the relationship. But the expectation is that these needs will decrease as time goes on and the newcomer becomes more knowledgeable, integrated, and engaged with the organization's social network and culture. It is important that both learning partners understand the nature of their commitment and how their role expectations will change over time. At the beginning of the partnership both members should expect to spend considerable time together. The veteran employee should be highly responsive to questions or requests that come from the newcomer who may be struggling to transition into their role. Conversely, the newcomer must be sensitive that the veteran employee also has a full-time job with other obligations.

Both partners should be clear on what sort of topics and requests fall under the realm of the learning partnership. In particular, which topics are appropriate for the partnership versus which questions should be directed toward the newcomer's manager or toward the company's

administrative support departments should be discussed. Lastly, there should be some sense of timeline toward when the partnership is expected to end and the employees will go from “learning partners” to “regular coworkers”.

**Step 4. Defining learning plan and strategy.**

It is important to outline how often meetings and check-ins should take place during the course of the transition. As newcomers experience the day-to-day operations of the job and organization, they should compile questions, concerns, and challenges to share with their partner during meetings. The veteran employee should try to answer the newcomer’s questions and also proactively share information and insights that the newcomer might not be aware of or have the opportunity to discover on their own. It may be useful to create a pre-defined calendar of meetings that includes different agenda items and topics to be addressed over the course of the new employee’s transition.

The following resources provide additional information relevant to creating transition and socialization partnerships. These resources were chosen in part because of their focus on different types of transition and socialization partnerships. Note that all of these resources address a range of activities associated with job transitions in addition to topics specifically relevant to creating transition and socialization learning partnerships.

- Wanberg, Connie R. “Facilitating organizational socialization: An introduction.” *The Oxford handbook of organizational socialization* (2012)
- Watkins, Michael, and Kevin T. Norris. *The first 90 days*. Gildan Media LLC, 2013.
- Bauer, Talya N., Berrin Erdogan, and Lauren Simon. “Effective new employee socialization.” *Meeting the Challenge of Human Resource Management: A Communication Perspective*. Routledge, 2014.

# Skills Development Learning Partnerships

Skills development learning partnerships are used to help individuals acquire specific capabilities or knowledge. They involve pairing an employee who wishes to learn a skill (the “novice”) with an employee who possesses and can teach them this skill (the “expert”). These learning partnerships are frequently used to augment or replace more structured job training programs. They are highly valuable for teaching complex skills that require understanding organizational dynamics and business practices — for example, teaching people how to effectively manage cross-functional projects, sell complex products and services, or carry out complicated technical tasks.

Traditionally, most skills development learning partnerships have taken the form of managerial coaching relationships or coaching relationships between two people in the same work group. Essentially, a person would learn job skills from their supervisor or from people on their team. However, as organizations become more complex and skill sets become more diverse and rare, these traditional approaches frequently no longer work. Managers don’t always have the appropriate skills and expertise that their employees need to continually develop. Employees may also need to develop skills that are not possessed by any of their immediate peers. Consequently, organizations are making greater use of cross functional skills development learning partnerships that pair novice employees in one part of the company with expert employees found in totally different parts of the company. The first time these employees may meet each other is through the creation of a skills development learning partnership.

Despite the growing use of skills development learning partnerships, not a lot of research has been conducted to specifically examine what

makes these types of peer-to-peer partnerships more or less effective. Research on employee feedback and coaching does provide some general insight into the unique value that can come from establishing skills development learning partnerships. Some of these benefits are outlined in Table 4.

The following are a few tips to keep in mind when going through the steps of establishing a skills development learning partnership.

## **Step 1. Defining partnership goals.**

Skills development learning partnerships are usually created to help employees acquire specific technical skills or job capabilities. For example, a junior project manager may be paired with a more senior, experienced project manager. They may also be used to give employees exposure to different parts of the business. For example, an engineering employee partner may be paired with a functional expert in finance to build awareness of and skills related to different business functions. It is important to identify what types of skills and capabilities people are expected to acquire through skills development partnerships. This will help employees to determine who they should partner with and what sort of results they should expect from the partnership.

## **Step 2. Matching partners.**

The primary factor in determining an appropriate partner match for skills development learning partnerships is expertise. The typical approach is to match someone with lower skills in a certain area with someone with greater expertise. But matches can also be made to encourage reciprocal learning so both partners benefit. In a reciprocal approach, the learning partnership is viewed



as an information exchange between two professionals rather than a one-way development relationship between a novice and an expert.

**Step 3. Clarifying roles.**

Skills development learning partnerships can vary widely in terms of the involvement and expectation of partners. At the most basic level, the partnership may be limited to the novice being given the opportunity to periodically talk to the expert and get their advice and guidance. At the most involved level, the novice may actually work for the expert in the form of an apprenticeship or temporary fellowship. It is important to define the scope, time commitment and expected duration of skills development learning partnerships.

Otherwise one partner may feel that they are not being given enough time, while the other partner may feel that they are expected to provide too much time to the partnership.

**Step 4. Defining learning plan and strategy.**

At the beginning of the partnership, both partners should set clear expectations for themselves and each other. They should discuss and agree on key variables and outcomes of the partnership, such as how often meetings take place, what is discussed in those meetings, who does what, and what the key objectives and goals are. It is also useful to define in advance expectations about the duration of the learning partnership and when it will end.

**Table 4.**  
**Benefits of Skills Development Learning Partnerships**

Increased employee receptivity to feedback and learning	Individuals are more open to performance feedback when it comes from someone perceived to be a credible expert <sup>69</sup> . Creating learning partnerships between employees and coworkers they admire is likely to enhance employees' willingness to seek and act on feedback. Employees may also be more open to feedback when it is delivered by someone who is perceived as being non-evaluative. This may make coworkers more effective coaches than managers since coworkers, unlike managers, do not make decisions about employee pay and promotions. In sum, employees may be more open to feedback from their colleagues than from their managers.
Reduced training costs	Organizations spend billions on formal training programs aimed at increasing workforce performance. Skills based learning partnerships use the skills and talents that already exist within the organization reducing the need to use formal training resources.
Increased workforce skills, knowledge sharing and agility	Providing increased opportunities for skills sharing across an organization not only leads to a more skilled workforce, it also creates more effective teamwork by developing relationships and shared mental models across different parts of the company. By creating cross-functional connections across the organization, skills development learning partnerships serve to enhance organizational knowledge sharing and workforce agility <sup>70</sup> .

# Intergenerational Learning Partnerships

Intergenerational learning partnerships offer employees the opportunity to share experiences and interact with a member of a different age group. Their primary purpose is to increase awareness and appreciation for the views, attitudes, and wisdom of employees from different age generations and to foster stronger cross-generational communication. Intergenerational learning partnerships can follow a traditional mentoring structure where an older employee acts as mentor to a younger employee, or may be a “reverse mentoring” relationship, where the younger and likely more junior employee is paired up to guide and coach an older and likely more experienced employee on how to under-

stand differences between their generations<sup>2,3,4</sup>. In either case, the point is to encourage cross-generational learning relate to how social values, communication styles, work beliefs and/or market perceptions may differ with age.

Table 5 lists some of the benefits associated with intergenerational learning partnerships. Notice that an effective intergenerational learning partnership will provide benefits to both of its partners.

The following are a few tips to keep in mind when establishing an intergenerational learning partnership:

**Table 5.**  
**Benefits of Intergenerational Learning Partnerships**

## Benefits for Older Employees

Sense of contribution to the future of their organization	Interacting and sharing knowledge with a younger employee can give older employees a sense of contribution to and pride in their organization that can last even after their career ends.
Deeper understanding of a younger generation <sup>9</sup>	Spending time with a member of a younger generation can give older employees a better understanding of younger employees as both individuals and as members of the workforce. The differences, but also similarities between themselves and what the younger generation wants from their employer might surprise older employees.
Insight about changing social structures <sup>10</sup>	Members of an older generation can gain insight about different views on relevant social topics like workplace diversity, life-long organizational commitment, and work-life balance.
Knowledge of new skills and technologies <sup>10</sup>	One of the most common reasons for establishing intergenerational learning partnerships is to give older employees an opportunity to benefit from younger employees’ knowledge of and skills with new technology.

**Step 1. Defining partnership goals.**

In order for intergenerational learning partnerships to be effective, both generations must believe the organization values their unique skills and perspective and that participating in the partnership will enhance their careers<sup>10</sup>. Members should agree upon goals for the partnership that reflect what each member wants to learn from the other. For the older employee, this might include enhancing learning new skills that are more common in younger employees (e.g., using new technology) or helping to build the depth of talent found in the

company<sup>10</sup>. For the younger employee, this might include gaining a better understanding of the company’s culture and values<sup>9, 11</sup>, learning from their more senior partner’s relevant life-experiences<sup>9, 11</sup>, and having the opportunity to interact with more senior members of the organization<sup>10</sup>.

Expectations about time commitments should also be established. This may differ depending on organizational culture and/or the formality of the learning partnership program. For example, employee pairs who participate in the reverse

**Table 5 continued**

**Benefits for Younger Employees**

Career outcomes <sup>49</sup>	Reverse mentoring can accelerate the career growth of younger employees. One study found that 91% of participating mentors were promoted within a year of an organization’s reverse mentoring program inception.
Sense of connectedness with the organization <sup>49</sup>	Partnering with an older employee who has been a part of the organization for a longer period of time can increase the younger employees’ sense of connectedness with an organization and the employees within it.
Self-confidence <sup>9, 11</sup>	Offering their unique skills to an older employee can increase a younger employee’s sense of confidence and self-worth as an employee in the organization.
Feelings of appreciation and professional respect <sup>9, 11</sup>	Younger employees who are asked to share their views and experiences with older employees may gain a sense of professional respect from more senior members in the organization.
Insight into company values <sup>9, 11</sup>	Partnering with an older employee who has been in the organization for some time can give young employees greater insight into the company values and culture.
Knowledge from more senior employees’ relevant life-experiences <sup>9, 11</sup>	Senior employees can offer years of relevant life and work-experiences to younger employees that can help shape their decisions and career trajectories.

mentoring program at one company were expected to meet for 30-60 minutes every 3-4 weeks. Participants in this program were also expected to devote an hour to research and for meetings with their learning partners, an hour to preparing for the session, an hour to conducting the session, and an hour for notes and follow-up for each of the sessions. This amount of time might seem excessive for some organizations while appropriate for others. What's important is that time expectations are understood and agreed upon by both partners

### Step 2. Matching partners.

The goal of matching in intergenerational learning partnerships is to ensure that both members are able to attain what they want out of the relationship. For example, a young employee in the IT department who expresses a desire to learn more about being an effective manager would be a good match with an older employee with years of management experience who wants to brush up on new internal technologies. More general factors such as personality type, interests, and learning style preference should also be taken into consideration<sup>49</sup>.

### Step 3. Clarifying roles.

Intergenerational learning partnerships that focus on reverse mentoring often violate traditional expectations about relationships between employee age and expertise<sup>10</sup>. Traditional expectations often assume younger employees should learn from older employees, not vice-versa. This makes it especially important to clarify the role that each member in the intergenerational learn-

ing partnership will play. Employees should be encouraged to reduce the influence of organizational hierarchy on the nature of the learning partnership. To avoid misconceptions in "reverse mentoring" partnerships, experts suggest publicizing the career accomplishments of the older (likely more senior) employee so younger employees understand the background and skills of the person they may be asked to "coach".<sup>10, 37</sup>

### Step 4. Defining learning plan and strategy.

Intergenerational learning partnership members should establish clear expectations for themselves and their partner. Agreeing on expectations is especially important for reverse mentoring learning partnerships that may go against traditional organizational forms. For example, if the older employee in the relationship wants to gain a particular skill from the younger employee, the younger employee might need to develop and assign weekly tasks to the older employee. The older employee should take learning goals and assignments from the younger employee seriously, and the younger employee should not be afraid to hold them accountable if they fail to do so.

The following resources provide more information about intergenerational learning partnerships and reversed mentoring:

- Murphy, W. (2012). Reverse mentoring at work: Fostering cross generational learning and developing millennial leaders. *Human Resource Management*, 51(4), 549-573.
- <https://blog.shrm.org/blog/reverse-mentoring-as-a-means-of-cross-generational-cross-life-stage-engagem>

# Diversity Mentoring Learning Partnerships

Diversity is critical to creating an innovative and high-performing workplace<sup>12</sup>. But organizations have long struggled to retain minority employees<sup>13</sup>. One solution to this problem is the use of diversity mentoring learning partnerships. In a traditional diversity learning partnership, a minority employee is paired with another member of the same minority group (i.e., same race or gender) who can act as a support system and guide. Because finding a mentor from the same minority group is very difficult in workplaces that lack diversity<sup>16</sup>, an alternative to the traditional diversity learning partnership is to create a diversified mentoring relationship, where two employees who differ in group membership (e.g., race, gender, ethnicity, disability, sexual orientation, etc.) are purposely paired together<sup>17</sup>. In diversity mentoring relationships, much like intergenerational partnerships, both members have the opportunity to learn from one another. For example, one company created a mentoring program where male board members committed to being the mentor of a female senior employee<sup>15</sup>. The goals of the program were to support gender diversity, to make women more visible within the company's hierarchy, and to provide the genders with an opportunity to gain insights from each other (e.g., career strategies, handling conflicts, work/life balance, etc.). Participants of the program reported experiencing growth in their self-awareness, adaptability, sense of organizational commitment, and level of insight into the motivations and consequences of their ideas and behaviors<sup>15</sup>.

Table 6 lists some of the positive outcomes associated with diversity mentoring learning partnerships.

The following are a few tips when going through the four steps of establishing a diversity learning partnership:

## **Step 1. Defining partnership goals.**

The same guidelines for defining partnership goals in career mentoring partnerships apply to most diversity learning partnerships. Goals of the partnership should be tied to specific business outcomes, and the success of the partnership should be tracked using metrics such as retention, career advancement, and satisfaction ratings.

## **Step 2. Matching partners.**

On one hand, research suggests that having a mentor of the same race and/or gender is important to protégés<sup>45</sup>. Protégés in same-race partnerships tend to perceive more psychosocial support than in a cross-race partnership<sup>57</sup>, likely as a result of sharing common experiences and concerns<sup>56</sup>. The same is true for protégés with a same-gender mentor. Cross-gender partnerships on the other hand can result in anxiety in partners about potential concerns related to emotional intimacy and physical attraction<sup>27,57</sup>. On the other hand, some research suggests that cross-race partnerships may actually be more effective than same-race partnerships. One study<sup>57</sup> showed that black employees who had a white mentor earned more compensation than black employees who had a black mentor. The authors suggest that because white men tend to dominate the power structure in large organizations, they may be able to offer their protégés certain advantages that female mentors or mentors of other racial groups cannot. The authors note that this does not mean that

mentors should exclusively be white males, but that it may be important to have white male mentors available to provide additional developmental support to mentees in organizations that lack diversity at executive levels<sup>57</sup>.

**Step 3. Clarifying roles.**

Just like in traditional mentoring partnerships, the mentor in a diversity learning partnership

should understand that their role requires providing coaching, career support, and social support to the mentee. In a diversified mentoring relationship, the minority employee should be told that their unique insight and point of view on topics is a valuable contribution to the partnership. Non-minority employees should be receptive, respectful, and try to learn from this different perspective.

**Table 6.**  
**Benefits of Diversity Mentoring Learning Partnerships**

**Benefits for the mentee**

Career outcomes <sup>50, 51, 52</sup>	Minority executives who had mentors showed faster salary and total compensation growth, and were approximately 20% more likely to receive a promotion than minority executives without mentors.
Feelings of inclusion and connection <sup>14, 15</sup>	Minority employees may have a harder time developing a sense of connection to their organization and fellow employees. Being part of a learning partnership can increase this sense of inclusion.
Organizational commitment <sup>14, 15</sup>	Minority employees who are part of a learning partnership are more likely to stay with their organization than minority employees who are not.

**Benefits for the organization**

Representation of minority employees at the managerial level <sup>53</sup>	Mentoring programs enhance the representation of minority employees at managerial levels by 9% to 24% compared to other diversity initiatives (training, target recruitment, cross-training, etc.) whose effectiveness ranges from only 2% to 18%.
Retention of minority employees <sup>53, 54</sup>	Mentoring programs can increase the retention rates of minority employees by 15-28%.

**Step 4. Defining learning plan and strategy.**

The same guidelines for defining a learning plan and strategy in traditional mentoring relationships apply to diversity learning partnerships. Both partners should set clear expectations for themselves and each other, and come to agreement on key variables of the partnership, such as level of activity and time commitment.

The following resources are recommended for more information about establishing and managing diversity mentoring learning partnerships:

- Clutterbuck, David, Kirsten M. Poulsen, and Frances Kochan. *Developing Successful Diversity Mentoring Programmes: An International Casebook*. New York, NY: McGraw Hill, 2012. Print.
- Murrell, Audrey J., Faye J. Crosby, & Robin J. Ely. (Eds). *Mentoring Dilemmas: Developmental Relationships Within Multicultural Organizations*. Mahwah, NJ: Lawrence Erlbaum Associates, Inc., 1999. Print.
- [http://www.catalyst.org/system/files/Making\\_Mentoring\\_Work.pdf](http://www.catalyst.org/system/files/Making_Mentoring_Work.pdf)  
\*Diversity & Inclusion (D&I) Practices section (p.17-20)

# Health & Well-being Learning Partnerships

The purpose of health and well-being learning partnerships is to establish social relationships where employees work together to achieve health goals. These partnerships can be created for specific goals such as training for a 10k run or more open ended goals related to overall lifestyle health such as “eating more nutritionally” or “exercising on a regular basis.”

Companies are investing more in the creation health and well-being learning partnerships due to growing recognition of the financial benefits associated with a physically and mentally healthy workforce. Even by modest estimates, stress and illness cost organizations roughly \$60 billion per year. Include injuries to this estimate and the price tag soars to over \$250 billion<sup>71</sup>. Health care costs are estimated to be approximately 46% higher for workers who experience high levels of stress, and 70% of Americans cite work as one of the major causes of stress<sup>72, 73, 74</sup>). In addition to the direct economic costs of poor health, other negative organizational outcomes associated with poor health and well-being include increased absenteeism and withdrawal, reduced performance, and decreased job and career satisfaction<sup>75</sup>.

While research specifically examining the benefits of health and well-being learning partnerships is limited, a considerable amount of research has shown that coworker and supervisor support in general acts as a vital buffer between workplace stressors and subsequent work stress, burnout, and illness. A few of these benefits are listed in Table 7.

The following are a few tips to keep in mind when going through the four steps of establishing a health and well-being learning partnership.

## **Step 1. Defining partnership goals.**

“Health” can be an elusive target when not explicitly defined. Because health and well-being encompasses many behaviors and outcomes, including potentially sensitive and confidential topics, health and well-being learning partnerships should begin with well-defined, mutually agreed upon, and realistic goals. Overall increases in health happen slowly over time, and these increases happen at different rates for different people. Set goals that are realistic to your current state of health to ensure you will build the necessary self-efficacy and confidence to keep it up. Consider how you will set and evaluate the success of both short-term health goals (e.g., taking the stairs over the elevator), and long-term health (e.g., have more overall energy).

## **Step 2. Matching partners.**

The strategy for matching health and well-being partners will depend largely on partnership goals. For example, if the goal is to quit smoking, partners could be matched based on others who have successfully quit smoking in the past. Such a partner would be able to empathize and understand the difficulties associated with smoking cessation, and be able to provide valuable advice for what might work versus what might not. Partners who are in a similar state of health, and who have similar goals may also be an appropriate fit. For example, two employees aiming to exercise more, may agree to partner up and go on daily jogs together or otherwise encourage each other along the way. This may be easier when both partners run at a similar pace, for example. When one partner seemingly “outperforms” another, this may be discouraging to both partners.



**Table 7.**  
**Benefits of Health and Well-being Learning Partnerships**

Reduced work stress	Research has shown that a common outcome of most learning partnerships is a reduction in work stress <sup>2</sup> . Learning partnerships focused specifically on health and well-being may have even stronger effects <sup>76</sup> .
Reduced burnout	Research has shown that support from coworkers and supervisors can reduce feelings of burnout and work exhaustion <sup>77</sup> .
Positive mood/ increased work satisfaction	With an increase in healthy behaviors and positive social relationships comes an improvement in employee mood <sup>78</sup> .
Increase in healthy behaviors (exercise, healthy eating) and reduced illness	Changing unhealthy habits into healthy ones, and then maintaining those habits over time is not an easy thing to do. Research has shown that social support and accountability toward others increases the odds that efforts to increase healthy habits will be effective and long lasting. Social support is also effective for helping people to eliminate unhealthy and dangerous habits like smoking, heavy drinking, or unhealthy eating <sup>79</sup> . The natural bi-product of engaging in more healthy behaviors and reducing the amount of unhealthy habits is an increase in overall health, and reduced susceptibility to illnesses.
Reduced healthcare utilization costs <sup>80</sup>	Activities that promote health such as health and well-being learning partnership programs can save costs by reducing worker’s compensation claims and healthcare utilization. For example, a review of seven studies reporting costs and benefits of health promotion programs was \$3.48 for every dollar expended <sup>81</sup> . Another review concluded that participants in work health programs have 25%-30% lower medical and absenteeism costs compared with nonparticipants <sup>82</sup> .
Increase safety behaviors and reduction in worker injuries	Research has shown that establishing a “safety climate” or culture is one of the best ways to increase safety behaviors and reduce both fatal and nonfatal injuries. Safety-focused learning partnerships represent one way to foster a positive safety climate <sup>83</sup> .
Increased engagement and performance	Research has shown that healthier workers are more engaged, and have higher performance-levels than unhealthy workers <sup>84</sup> .

### Step 3. Clarifying roles.

As with all learning partnerships, clarifying the roles each partner plays is vital for success. Partner roles will depend largely on the objectives and nature of the match. Important things to consider include when meetings take place, what is expected of each partner and how they will support one another, and what each partner hopes to gain from the relationship. When it comes to health and well-being learning partnerships, it is also useful to make people aware of the differences between instrumental and emotional support. Instrumental support refers to efforts to provide access to tangible resources that help address health-related challenges (e.g., giving an employee a fit-bit or health tracking device). Emotional support refers to efforts to empathize with health-related challenges, and share health-related experiences to strengthen emotional resilience and connection. Both forms of support have been shown to uniquely impact employee health and well-being by buffering the effects of common workplace stressors on health<sup>85</sup>.

### Step 4. Defining learning plan and strategy.

Employee health and well-being is influenced by a range of factors. Many of these things are not addressable through a learning partnership alone. The following is a list of common sources of workplace stress that can damage employee health:

- Poor social interactions with supervisors, coworkers, or difficult customers.
- Work-schedule issues related to shift and night work, long working hours, or excessive overtime.
- Uncertainty caused by organizational changes such as mergers, downsizing, restructuring, or implementing new technologies.
- Work-family conflict.
- Role ambiguity due to not knowing what you're supposed to be doing or being asked to do things that conflict with one-another.
- Ineffective or unsustainable coping behaviors for stress including drug or alcohol abuse.
- Unhealthy eating habits
- A sedentary work routine resulting in lack of adequate exercise and physical activity.
- Poor ergonomic working conditions caused by poorly designed furniture or work stations.
- Working conditions exposing individuals to excessive noise, heat or other stressful environmental factors

Part of developing a health and well-being learning partnership strategy should include educating people on the factors that impact their health and well-being goals. By understanding the factors that lead to work stress, burnout, and poor health, learning partners can more effectively pin-point their own sources of poor health and select appropriate strategies to improve. Partners should encourage each other to focus on what they can control and support each other in finding ways to change their work environment to enable healthier behaviors.

If the goal of the learning partnership is to make lasting lifestyle changes that support healthy living, partners should be educated on creating conditions that motivate healthy habits and behaviors through reminder, recognition and rewards. This may include implementing methods that enhance accountability to healthy goals, increasing positive social interactions focused on health-related activities, and creating systems

that provide employees with emotional or instrumental support to help them achieve their health goals. Changing health related habits can be very difficult. Educating and advising learning partners on how to be successful in achieving health and wellness goals will increase the success of the overall learning partnership program.

The following are a few additional resources to consider when establishing a health and well-being learning partnership program:

- Lewis, Megan A., et al. "Understanding health behavior change among couples: An interdependence and communal coping approach." *Social science & medicine* 62.6 (2006): 1369-1380.
- Quick, James Campbell Ed, and Lois E. Tetrick. *Handbook of occupational health psychology*. American Psychological Association, 2003.
- Tetrick, L. E., & Quick, J. C. (2003). *Prevention at work: Public health in occupational settings*.

# The Role of Technology in Creating Learning Partnerships

Learning partnerships are highly effective because they leverage people’s inherent preference and skill for socially based development methods. Most people prefer to learn from other people instead of reading books or attending classes. The strength of learning partnerships is inherently tied to their human nature. Technology cannot effectively replace learning partnerships, but it does help with establishing and managing these partnerships within an organization. The following are some ways technology can be leveraged to enable learning partnerships:

## FINDING AND MATCHING LEARNING PARTNERS.

In larger organizations, finding appropriate matches for learning partnerships can be very difficult. Technology can help employees find potential learning partners by creating a means for partners with similar interests or characteristics to automatically be matched with one another.

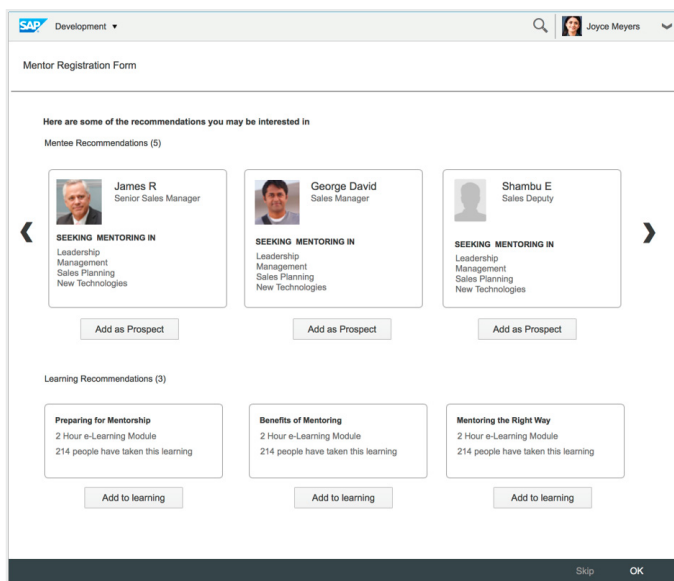


Figure 1. Partner Matching Technology.

## MANAGING LEARNING PARTNERSHIP ACTIVITIES.

Technology can help learning partners structure their relationships, define objectives, keep track of ongoing meetings, and track progress toward partnership goals. It can also provide reminders and other forms of alerts to keep partnership activities on track.

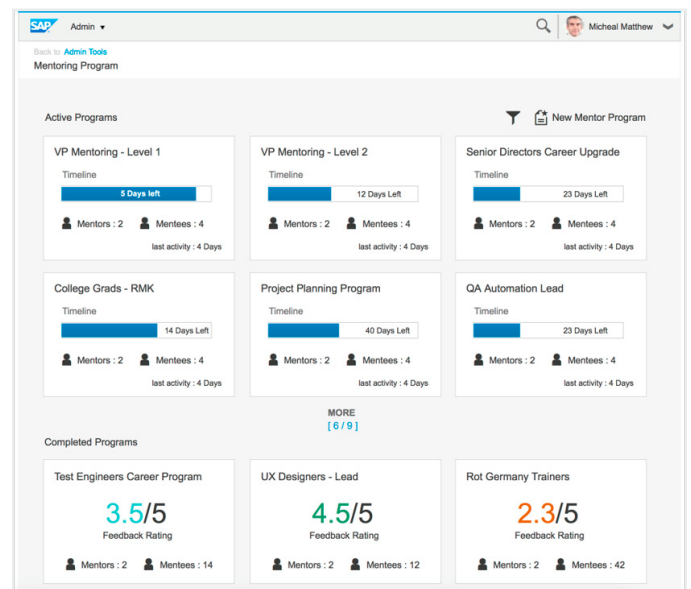
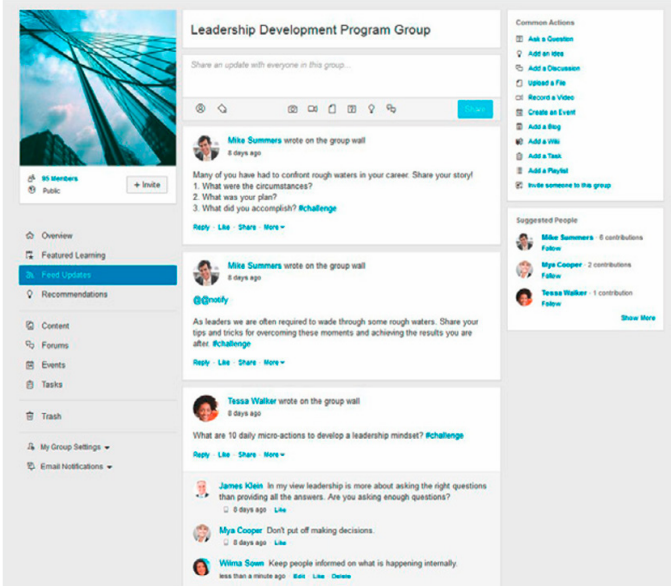


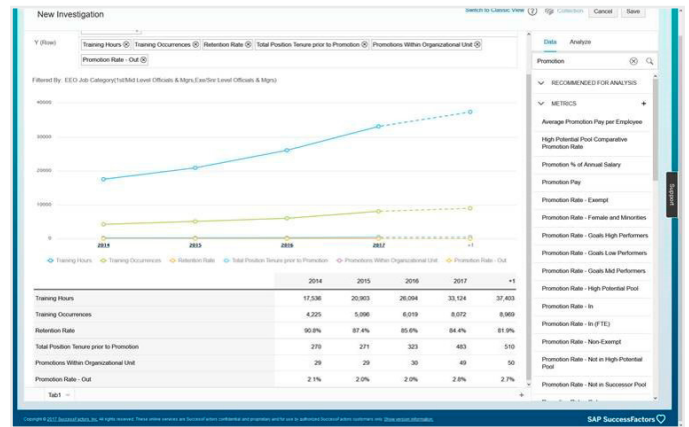
Figure 2. Partnership Management Technology.

Sharing learning partnership expertise. Technology can enable employees to share ideas and materials across different learning partnerships. For example, if a mentor developed a particularly effective development exercise for a protégé they could easily share this with other mentors in the company.



**Figure 3.** Learning Collaboration Technology

Tracking partnership utilization and impact. Technology can help organizations track the number of learning partnerships and analyze relationships between partnership participation and organization outcomes such as retention, promotion and career advancement. This can be used to measure and improve learning partnership programs over time.



**Figure 4.** Learning Partnership Analytics Technology

These are just a few ways human capital management technology can support greater use of learning partnerships. Perhaps the greatest strength of using technology in this manner is to enable the creation of formal programs that encourage and help employees to form these partnerships rather than having employees just wait and hope that such partnerships will form on their own.

# Conclusion

Learning partnerships are arguably the oldest and most natural way for people to learn. For as long as anyone can remember, people have been building relationships with the goal of acquiring new knowledge and learning how to do things more effectively. What's challenging about learning partnerships is they can be difficult to establish in large organizations. Employees may lack the knowledge of how to create effective learning

partnerships or struggle to find appropriate learning partners. Fortunately human capital management technology is removing the barriers to creating and maintaining learning partnerships. Paradoxically, modern advances in development technology are enabling people to better leverage the most ancient development method of all: learning by talking to people who know more than we do.

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