The Future of Compliance Training: Just Enough, Just-in-Time & Just for Me

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Olympus Corporation of the Americas

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Mercer/Marsh & McLennan Companies

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Rebecca Rehm, LPEC

- Olympus Corporation of the Americas (2017-)
  - Compliance Business Partner Manager
  - Diversity & Inclusion Council
- Training and education background
- Williams College, Rugby | Brown University
Make people’s lives healthier, safer, more fulfilling

- **Med device, microscope, industrial, camera**
- 36 countries
- 35K employees
- Tokyo HQ
- 100 Years

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**Matt Doherty, Mercer**

- Mercer (US), Inc. (2000 -)
  - Compliance Operations Leader, Global Operations
  - Mercer Cares
- Operations management background
- Bridgewater State University
Global consulting leader helping clients around the world advance the health, wealth and careers of their most vital asset — **their people**.

- Talent Strategy
- Global Benefits
- Employee Financial Wellness
- Executive Compensation
- Due Diligence (M&A)
- Endowments and Foundations

25K employees in over 40 countries

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Why

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Poll:
To what extent has COVID-19 impacted your organization’s C&E training/training plan?

- Significantly
- Moderately
- Minimally
- Not at all

Adapting to change

- Adapting to the rapid changes within your business and the industry.
- Evolving to meet the demands and needs of your employees.
- Needing to create effective messaging while minimizing impact to the business.
Why Evolve Training?

- Adult Learning
  - Self-directed and motivated
  - Build off past experiences
  - Practical, help solve problems
- Mobile, social, busy | boring = bad
- Align with evolving guidance

“The future of learning is three ‘justs’: just enough, just-in-time, and just-for-me.”
-Patty Woolcock, CSHRP

Benchmarking
Poll:
How Do You Communicate and Train?
*Choose all that apply*

- Email
- Intranet posts
- LMS/CBT
- Live training
- Videos
- Q&A Panels
- Mailings
- Desk drop / Posters
- Newsletters
- Team Meetings
- Apps
- Giveaways

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Where We’ve Been

*The Future of Compliance Training: Just Enough, Just-in-Time & Just-for-Me*
Where We’ve Been @ Mercer

- Global emails
- Regional emails/newsletters
- Town halls
- 30-60 minute CBT

Where We’ve Been @ Olympus

History
- Compliance program
- 2016-19 DPAs | 2016-21 CIA

Recent Training Plan
- Risk-based, targeted (3+ hours)
- 8 CBT - mandatory, pay-impacting
- 1+ live, in-person
Where We Are Now

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Olympus: “Selling” Compliance Value

COMPLIANCE Overview

We believe in building relationships based on trust.

We build trust by:
- Being business partners
- Proactively solving problems
- Making your work easier
- Providing protection & assurance

We run a best practice compliance program aligned with government guidelines.

Our Core Values

- Integrity: We are trustworthy and act in good faith.
- Unity: We are stronger when we work together as a team.
- Agility: We challenged the status quo with energy, focus and speed.
- Long-term View: We look beyond the present to future value.
- Empathy: We care about all of our stakeholders.

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Where We Are Now @ Olympus

Training > replacing some with:
- Humor - Real Biz Shorts, Second City
- Videos - In-house
- Animation - Vendor customized
- Efficiency - Test out, Shorter

Communication > FAQs, Infographics

“Most learners won’t watch videos longer than 4 minutes.”
-Meet the Modern Learner, Bersin by Deloitte

Just Enough
Olympus: Just Enough

- Conflict of Interest LMS Training
  - 5 slides: overview, examples, infographic, disclosure link

Mercer: Just Enough

- Activity, risk-based communications for targeted audiences
- Introduction vs. reinforcement
- Short, engaging awareness videos
- Simple, eye catching infographics
- Content must align with theme
  - “GDPR in 60 Seconds”
Mercer: Just Enough

- Diversifying educational materials

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Mercer: Just Enough

- Compliance Series - “Good Morning, Mercer”

“Very Informative!!”

“This video was a very creative idea for a privacy rules! Congrats.”

Great short video!

“Thank you for the reminder. I like the format – very engaging.”

“Very innovative way to share privacy and protection key best practices. Appreciated.”

Morning talk show meets Late Night TV.

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Training & Communication Plan

► What drives it?
  ► Risk assessments and monitoring findings

► What method to use?
  ► Integrate education into employees day to day work (i.e. business processes)

► How to capture everyone?
  ► Translations are key

Activity:
Reflect, then Chat Your Examples

Key Risks ► Business Process ► Embed Education ► Innovative Examples

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Just-for-Me

Olympus: Just-for-Me

- National Sales Meeting In-Person Training
  - 6 custom sessions, survey, BU leaders pick topics
Mercer: Just-for-Me

- Compliance Events - Privacy Day
- Colleague focused events
- Colleague engagement - integrating compliance messaging

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Just-in-time learning optimizes retention because of immediate application - SHIFT

Just-in-Time

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Olympus: Just-in-Time

- Podcasts for sales reps during “windshield time”
  - In-house creation
    - Screencast-O-Matic - free video recording, editing
    - Record on PC with USB microphone
    - Upload to Microsoft Stream
  - E.g., Medical device product evaluations

Mercer: Just-In-Time

- Short, simple computer-based training with skill checks...
Mercer - Just-In-Time

- Targeted awareness videos deployed to reinforce prior learnings...

Lessons Learned
Challenges

- Leveraging technology to integrate
  - Business alignment
- Video development
  - Creating content
  - Approving content
- Diversity
- Balancing humor and avoiding slapstick

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Questions?

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Thank you!
Resources

- Evaluation of Corporate Compliance Programs, US DOJ
- Start With Why, Simon Sinek, TED Talk, YouTube
- Meet the Modern Learner Infographic, Bersin by Deloitte
- Is Your Company Embracing Just-in-Time Learning? SHIPT
- 4 Best Practices To Use Animation For Training, eLearning Industry
- Drip Marketing 101: Definition, Benefits and Best Practices, CLEVERISM
- How Learning and Development Are Becoming More Agile, Jon Younger, Harvard Business Review
- The Microlearning Guide to Microlearning, Carla Torgerson

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Tool: Education Plan

- Risk-based: Identify highest Ethics & Compliance risks
- Mitigation: Determine how to best mitigate (e.g., training)
- Implementation: Embed in business process or standalone
- Audience: Targeted by location and/or function
- Goal: What should people know/be able to do after training
- Timing: One-off, just-in-time or year-long campaign
- Method
  - Communication (e.g., Yammer/Chatter post, email, poster)
  - Training (e.g., LMS/CBT, live webinar, in-person presentation, hands-on workshop)
  - Resource (e.g., website, app, tool, podcast, video, take-away)
- Evaluation: How will you know and show it’s working (e.g., KPIs)?