

**Learning Uncut Episode 125:  
Bendigo Bank's Learning Transformation – Caroline Petha,  
Jo Doody & David Maiolo  
Hosted by Michelle Ockers**



**Michelle Ockers:**

I'm joined by three members of the Capability leadership team at Bendigo Bank - Caroline Petha, Jo Doody, and David Maiolo – talking about their experience in transforming learning over the past three years. Starting with a clear vision for what learning should look like, they have worked consistently to achieve it. Each member of the team has taken the lead in a specific area, which we break down and discuss separately in the episode.

Jo shares details of shifts made in capability and leadership, in particular discussing embedding and making frameworks useful. Caroline discusses learning design and how they've partnered with senior leaders to create a learning roadmap for a series of portfolios. Lastly, David delves into the ecosystem and culture of learning, sharing his broad perspective on five elements that are crucial to creating a successful learning environment.

Although each guest leads a different aspect, their work is well integrated, resulting in a coherent body of work that has been undertaken across their teams – and in partnership with business leaders, others in People and Culture, and external partners.

This episode is longer than usual, but we decided to keep it as one conversation to best appreciate the cohesive nature of their approach. For those interested in specific aspects, timestamps can be found in the show notes, or the transcript can be downloaded for future reference.

**Michelle Ockers:**

So today we've got three guests, this is going to be a bit of fun. Caroline Petha, welcome.

**Caroline Petha:**

Thank you. Hello.

**Michelle Ockers:**

Jo Doody.

**Jo Doody:**

Good morning.

**Michelle Ockers:**

And David Maiolo. Welcome David.

**David Maiolo:**

Thank you for having me.

**Michelle Ockers:**

So you're all colleagues at Bendigo Bank, and we're going to get you to introduce yourselves in a moment, but let's start with Bendigo Bank. Jo, can you tell us a little more about the organization, what you do, who you do it for, and maybe a bit about your workforce.

**Jo Doody:**

Yeah, certainly. We have over 160 years of history, we, the bank, and we started off with our roots as a co-operative building society so all those many years ago, our strong connection to community continues today with our organizational purpose of feeding into the prosperity of the communities in which we operate, not off of it, so that stands true for all the work that we do. Our differentiator with

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

other banks is our unique community bank model, so we partner with communities who own and run their own bank.

And part of the profits of those branches is invested directly into the communities in which they operate. So that's fairly unique for us, and since 1998, over 290 million have been re-invested in those communities across Australia, which again, holds true to us feeding into the prosperity of those areas. We're regularly ranked among one of the most trusted brands within Australia, so we're very proud of that, and we hold that dear and as a business for a top 100 ASX company with more than 110 shareholders and two million customers and growing every day, our footprint is 500 locations across Australia including head office branches across many of the capital cities as well as even Bendigo, and we have a bricks and mortar presence across Australia through many community banking corporate branches, and in terms of our employees, we are a bit over 7000 that are dispersed across all those areas across Australia, and they have a wide range of roles and responsibility, so it's a pretty diverse organization that from as a learning function, we're certainly needing to keep that in mind in the services that we provide, the organisation.

#### **Michelle Ockers:**

Thanks Jo, that was pretty comprehensive. And your workforce, what are, in terms of roles, we've had a lot of people from financial services on the podcast, so we've got some familiarity as a listener group with the kind of workforce in banks, what would be the key roles or perhaps more interestingly, some of the characteristics of your workforce that might be a little bit different from other financial services companies?

#### **Jo Doody:**

Yeah, so I think the largest portion of our workforce would certainly be in our branch network, and because of the community bank connection, then obviously they're working within their community, contributing to their community, so the boards of these community banks are also locals, so it's definitely got that flavour, so that's interesting for us and creates some opportunities and some challenges, so that's probably our largest part of our workforce. But in terms of, we're pretty standard in terms of our bank, we've got the customer enabling part for the business and the growth areas there we're seeing around the technology, cyber security and financial crime to certainly some new areas that have emerged over the recent period. And the focus on digital and data is certainly highlighted for us from a specialisation perspective, and other than that we've got the usual customer-facing areas and supporting areas such as your contact centres and your mortgage processing area, so a pretty broad range that are both professional services aspects, as well as the customer service and sales aspect as well.

#### **Michelle Ockers:**

Right, thank you. So David, let's hear from you, how is your learning and development team structured to support this workforce?

#### **David Maiolo:**

Yeah, so rather than a learning and development team, we have an organizational capability team, so that includes the people on this call plus a few others, so that's headed up by Carmel Speer, our head of organizational capability, Caroline, who we've met, who is our senior manager of learning design. I'll let the individual people on the call talk more about their role specifically, but we've also got Jo who heads up our leadership talent and capability area, myself who looks after learning channels and ecosystem, and then a couple of other colleagues who aren't on the call today that look after learning assurance and... Sorry, learning engagement and assurance, as well as a senior manager of diversity and inclusion. So it is broader than just learning, but we all work very closely together as one cohesive unit, which is actually nice.

#### **Michelle Ockers:**

Great. Thanks. And roughly how many people have you got working in L&D across all of those areas?

#### **Jo Doody:**

Round about 30.

#### **David Maiolo:**

How many people... I reckon it's about 30, yeah.

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

**Caroline Petha:**

Yeah.

**Michelle Ockers:**

Okay. Thank you. So let's break it down a little bit in terms of your roles. Give you a chance to introduce yourselves because I think that's important to understanding some of the elements we're going to talk about here when we get into your transformation that you're undergoing with learning at Bendigo Bank. So Jo, let's start with you. Tell us a bit about your role in your team.

**Jo Doody:**

Yeah, so as David mentioned, my focus is around capability, leadership and talent, so I have a small team of four people who really focus on building, implementing and looking to continually embed and improve frameworks, so we create some key frameworks and processes, but also aligning to their resources that support the business and their internal P&C people to deliver on their work, as well as learning to support the capability and leadership needs of the organization, so we can do that. We're a very small team of four. So we really rely on partnering with the business in terms of their role in aligning to and using our frameworks and processes and resources, as well as internal and external specialists to support us in designing and delivering the work, and we have realized the importance of engaging with leaders and the people themselves in order to bring the frameworks to life in the context of their business.

**Michelle Ockers:**

Right, thank you. And I'm sure we're going to talk a bit more about that engagement with people around the business as we go through here. Caroline, well, how about your role in your team?

**Caroline Petha:**

Yeah, thanks, Michelle. So I head up, I lead the Learning Design team, and I've got eight people in my team, and that consists of... We have learning design leads, each leading and managing a portfolio of work, now those portfolios can span across the enterprise in terms of some capability needs across the enterprise, so like the risk and compliance, sales, any of that sort of corporate induction type materials. And we also have some portfolios which our business unit focus, so more of a very deep vertical type focus. We also have two team members who support the lead, so in terms of any builds and so forth, we have a hybrid operating model, so what I mean by that is we have the internal capability to build our learning solutions, but we also partner with a small number of trusted external learning partners, whom I like to refer to as an extension of my team, so they're often coming in to help us out with any overflow or some of those bigger projects where we just need some more hands on deck, so that's a little bit about the learning design team.

**Michelle Ockers:**

Right, thank you. And I like the way you think about your external partners as extensions of your team, I think the way we think and approach philosophically our relationships with external partners is really important to making the most of those relationships as well.

**Caroline Petha:**

Absolutely.

**Michelle Ockers:**

Yeah. So David, tell us a bit about your role and team.

**David Maiolo:**

Yeah, so learning channel is an ecosystem, so we've got about eight employees, including myself that fit under that remit. We're focused on really enabling the other teams in organizational capability and our broader stakeholders in the learning space. The main facets that I look after are the learning technology, driving a learning culture, and I have a team responsible for the learning coach team, they're responsible for our facilitation, so our digital workshops, our face-to-face workshops, etcetera, but we own and manage a lot of the tech and the infrastructure that sit behind learning to enable it, so Jo's team, Caroline's team can work efficiently in what they need to achieve.

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

**Michelle Ockers:**

You piqued my curiosity when you talked about learning culture being driving learning culture and being part of your responsibility as well, and of course, it's everyone's job, but someone's got to hold the space for it, right?

**David Maiolo:**

Exactly right.

**Michelle Ockers:**

And this is often the work I do with organizations looking at their operating model for learning and development. It's often really tricky to figure out who best to hold the space and take the lead on driving learning culture in the organization. Because as I said before, it's kind of everyone's job, but someone needs to lead it up, so we'll come back to that, I think.

**David Maiolo:**

Yeah, we can certainly talk to that.

**Michelle Ockers:**

Yeah, thank you. So with that, let's talk about the learning experience and what learning is like for the people at Bendigo Bank. Let's create some contrast, and Caroline, we'll go to you on this one. I think we're going back about three years over the work you've been doing to shift learning at Bendigo Bank. What did learning look like at Bendigo Bank three years ago and why was a change needed?

**Caroline Petha:**

Sure, so I think it's fair to say that we were in an environment where we were more reactive in terms of, not necessarily waiting, but our work was based upon requests that were being received from our internal clients, so we were getting those ad hoc type learning requests that could range from very smaller type learning initiatives to very large, so it was really hard to prioritize as you can imagine, and I'm sure a lot of people on this listening would appreciate that everyone's request was more important than someone else's. So it was often challenging for us to prioritize the work load with the team that we had. Learning was predominantly face-to-face or it was an e-learning module.

Our technology, we simply had our LMS, but in our businesses, we also knew that there was learning located in various places, so sometimes it was very challenging for our people because learning was accessed from numerous locations. In terms of a capability framework, it was not well embedded and the focus was more so on skills as opposed to building sort of that longer-term capability, and our learning was not aligned to those capabilities as well. In terms of leadership, our leadership framework was probably not well articulated back then, and so what we saw was that there was some inconsistencies there in terms of our expectation of our leaders. We probably had to focus more on management as opposed to leadership, and without that consistent approach, what we found is we would have businesses maybe just doing their own thing in terms of sourcing and maybe funding new leadership development.

So I guess when we looked at where we were at, and then when we thought about where the world of learning was changing, we knew we had to make a shift, we had to make some difference, make some change and I resonate... I remember there was the whole Bersin's modern learner that was introduced, and that was a point in time... I know for me, and I know for many people, it had you stop and think and realize that L&D was real, it was changing, and we had to respond to what our learners were looking for. And if we think about how people are learning outside of work, we know it's not from a classroom event or just an e-learning module. It's learning in the flow, it's learning every day, it's learning bite size, so we knew we had to make a shift and so that's what essentially was about three years ago when we needed to make that change.

**Michelle Ockers:**

Yeah. And I will put a link to that infographic from Bersin, Meet The Modern Learner, I can picture it as some of our listeners no doubt will, but just in case people aren't familiar with that, I think it had a profound effect that particular infographic on getting people in learning and development teams to really start to think about the day-to-day, the reality of the context of people's daily lives at work and how busy they are. Did you find that when you started talking to people in the business about the

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

need for change, that they saw it the way that you did, or did you have to do some influencing to build the case for change?

#### **Caroline Petha:**

I think influencing, I think... And I'm sure David and Jo, they might have some things to add too, but... And I think we're still going through that, Michelle. I think people would be used to a way in which they've learned and have learned for a very long time in an organization, and if you think people assigned learning and they will learn when they... Something is given to them or when their leader is telling them to do something, as opposed to being able to access it themselves and access it easily, so I think we're still going through that influencing Michelle, I wouldn't say... I guess that's part of what we're looking at moving forward as well as we keep going with our ambitions and our aspirations.

#### **Michelle Ockers:**

Yeah, it's an interesting paradox, isn't it, that the shifts we're wanting to make, we're doing it in service of the people that are trying to get a job done day-to-day and to make it easier for them, that they're not necessarily asking us to make that change that we're seeing that it would be of value to them. So how have you actually gone about engaging with people to get them on board? We're doing things differently. What's worked?

#### **Caroline Petha:**

I'm thinking that as we've built, as we've slowly started to shift, so from a design perspective, we're starting to space out the learning, so rather than learning being in that one hit and then somewhere it's like this information overload, we are certainly in some of the cases building learning and spacing it out, so people are having the opportunity to gain some new knowledge and be able to apply it back in their roles, and where we're doing that, we're seeing people are liking that because it's almost just that breaking it down and then building upon it.

#### **Michelle Ockers:**

So do you think it's a case of giving people a different experience so that they've got the contrast that maybe this is something that happens to people when they come to work that they don't recognize it, they can just apply the same practices that they do outside of work? Any thoughts about that? Maybe David.

#### **David Maiolo:**

Yeah, so there's a range of sort of facets that we're working on, and that comes down to the learning culture piece, we don't... It is a learning culture piece, but really when we talk about it, we talk about building a learning organization, so Caroline was talking about some of the shifts that they have been making in the design space and being able to show those examples to our stakeholders and the business areas that we partner with has really given her a good space to have those conversations on the shift, when about the shift, when we're talking about general employees, really it's about giving them the opportunity to go and explore. But they don't... They can't do that unless they know what's there and what's available. So a lot of it is about education of our general population of employees and our people, so we're doing things like road shows, we're encouraging people through communications through things like a learner palooza event that we do, to start to look at the way learning can be done in a different way, and for not to just be about the compliance things that are assigned to you, the stuff you have to do, but more about how learning can support you in your career and in your growth and being able to keep up with the modern workplace.

So there's a lot of work we are doing to communicate and encourage learning practice in the bank, working with leaders, you know, and Jo's team plays a large part in that role of working with leader cohorts to showcase the way learning can be done and, you know, best practice around learning. And when you combine that with the learning design that Caroline's doing, it starts to fit together. But as we said, we do have a long way to go and there's... I could talk about building a learning organization on the podcast on its own, there's a massive strategy that we're working towards, but they're just some of the things that we're doing in that space.

#### **Michelle Ockers:**

So Caroline, let's circle back to you, you started by painting a picture for us of what learning used to look like three years ago, we kind of went down this interesting side track of how did you go about getting people on board to share or to get buy-in with shifting. What we probably didn't talk about,

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

although there were hints and teasers in there is, what do you want learning to look like at Bendigo Bank? So what does it look like today? And where are you headed? What's the learning experience that you're endeavouring to provide people with?

#### **Caroline Petha:**

Sure. So as David sort of touched on it, where we talked about the learning organization, so starting with our aspirations is we want to build a culture where learning is continual, it's easy to access and it's well-supported, so we look to shift that learning mindset and build what we are referring to as a learning organization over the next couple of years, and so our role is about encouraging how our people can think differently about learning and how you learn, and that it need not only be in a classroom or in a learning module, because as we all know the real learning always is taking place outside of these formal learning events, and we've got a couple of learning philosophies there that we live and breathe, I think every single day, and that is, one is to learn every day, we learn in the flow of work, and we learn from people, practice and programs. So I think for all of us in organizational capability and in the Ben U team is that whatever we're doing, we're continually bringing back those philosophies and thinking about how we can encourage our people to learn continually.

#### **Michelle Ockers:**

Yeah, philosophies or principles are so valuable as a touchstone to get sort of people consistent and to check point how you're working and are we still consistent with these philosophies or principles. So that kind of leads us into the idea of having a strategy, because I'm sure these philosophies are kind of embedded in your strategy or part of your strategy. Jo, can you talk to us about your learning strategy, and I believe you've got something called Ben U on a page?

#### **Jo Doody:**

Yeah, we do. So our strategy is focused on Ben U and Ben U is our take on a corporate university, so that is underpinned by those philosophies that Caroline mentioned around learn every day, accessible learning, learning through the flow and through people, practice, programs, so they hold true with that and with our strategy what we wanted to make sure is that it provides us with a focus, so we know, as Caroline mentioned, we get asked to do lots of things all the time, we can't do everything, so what are the most important and relevant things for us to be focused on? And the strategy on a page allows us to do that and we frame it up in the language of our people, so it's quite... Often you can go off into your own L&D language and it doesn't resonate with people, so when we're sharing this with others, we were really cognizant of ensuring that it was in their language, so we have things in little speech bubbles that focus us in on what does it mean to our people, and it's things like I feel welcomed, it's that I have new skills to perform well in my job, that I grow in my business, that I lead Ben, that I have a great career. So we're thinking about any of our work and how it aligns to any of those particular pillars, and those pillars then focusing on one of the most important capabilities and skills that are relevant to our organization in looking to help it achieve its objectives. And the strategy also includes some enablers, so what are the foundational enablers that we need to ensure are in place so that we're able to build the skills and capabilities, and they include the people capability framework, it's the learning organization that Dave mentioned, it is around our ecosystem and it is around ensuring that we've got the right governance and evaluation measurement in place, so those things are foundation enablers that enable us to focus in on what this means to our people and the skills and capabilities that they need.

#### **Michelle Ockers:**

Right, thank you. So that was about three years ago, right?

#### **David Maiolo:**

Yeah.

#### **Michelle Ockers:**

That you laid down Ben U on a page. So obviously, you've invested in multiple streams of activity there, you've talked about your pillars and your capabilities pillar, and then the enablers, and there are multiple initiatives going on at the one time, you've invested in capability, leadership, learning design, learning channels and your ecosystem. Let's break it down into some of these key areas and tease out maybe some of the interconnections as we go along, so Jo, let's start with you around the investment in capability and leadership, what was the shift you were seeking to create and why was that important?

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

#### Jo Doody:

Yeah, so I guess it was thinking about learning and learning for that. And a couple of those foundation pieces is the capability of our people and the leadership that our leaders have, so there were two really important pieces for us to focus on, and why were they important, is the impact that they have on organizational outcomes. And fundamentally, that's what we're needing to drive. In terms of the need to shift, if I think about the people capability framework, it was six years old, and as Caroline mentioned, the world to change, like the internal organization had changed, the external environment had changed, finance industry had changed, the way we work had changed, so the old one wasn't contemporary, it wasn't keeping up, and it wasn't relevant and it wasn't being used. It was in the bottom drawer, it wasn't embedded, it wasn't something that people connected to, so it was time for a change in order for us to update it and make sure it was relevant and important to where the organization was heading, not where it was six years ago. In terms of the leadership piece, we didn't really have an embedded structured framework around leadership, so while we had tried a number of times to determine what our leaders...

What we expected of our leaders, it didn't hit... No rubber hit the road on that, our business and our leaders within their business would make up their own minds in terms of what they thought leadership was and what was expected, and that would go and source some of their own IDs and training and do one-off events that never got any traction in the long term within the business, and from a learning perspective, our learning didn't align with their capability framework, and it also... While we did leadership training, it probably didn't align to a consistent approach to what we expected of our leaders, so it wasn't really enabling necessarily in the long term the leadership shift that we needed, so something definitely needed to change in order for us to support the organization in what it needed our leaders and our people to do.

#### Michelle Ockers:

So what have you done differently then either in terms of what your frameworks look like now, or how you develop them, like what did you do differently to get to a point where you could reverse some of these problems and get these frameworks embedded, get them being used consistently?

#### Jo Doody:

Yeah, so probably one of the first things was to make sure that we had commitment and advocacy at an executive level to tackle these things because without their support, then nothing really sticks, so it's that top-down support was necessary, and with both of the frameworks, while we did external research, we did external thought leadership, we came up with some initial thinking, we then went out to our people in order to help them get in to help us develop these things, and so with their people capability framework, we did a whole range of focus groups and surveys and research and power sessions to get them to help frame up what are other words that describe the capabilities that we require, and how is this contextualised in your business in the work that you do...

And what does proficiency look like at four levels of proficiency from foundation through the expert, so we actually did a very significant amount of consultation to get our business to help us to frame up a new capability framework that looked very different from the old one, and that refresh was initially 12 capabilities that each had the proficiency descriptions popped in to that, and more recently with some current strategic work that we're working on, we've added three more, and we know with some of the future work going on that this capability framework needs to be a dynamic document because things are shifting still, so it's not something that you just sit on forever, you look for triggers as the business changes in order to continue to review the capability framework and refreshing it, because we do think that it's still relevant, but there's probably some tweaks we don't need to totally recreate or we don't need to iterate the framework as it is now.

So through consultation, we came up with a new approach, have we got it entirely right in terms of, is it fully embedded? No, so that's still a work in progress, and from a learning perspective though, our learning is now aligning to the capabilities, and we've built a tool kit that is aligned to having our leaders and our people being able to connect with the capabilities, consider which ones are most important for them in their role, consider where they might sit from a strength perspective and consider where the gaps might be and therefore aligning that with learning, that learning is available, that they can self-access in our My Ben U, which is our learner experience platform, so we've done a

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

huge amount of movement over the last three years, but there's still definitely work to happen with there.

#### **Michelle Ockers:**

Yeah. So that's interesting, the capability... Who is the capability framework for is the question that comes up a lot, and one of the obvious audiences is the internal audience, and I know we'll talk with Caroline a little bit about how her team uses that, it sounds like you're going through a lot of effort to get learning aligned to the capability, so there's some coherence and consistency there, but you also mentioned helping your people to be able to self-assess or to assess... I'm not sure if you used the word self-assess, but to be able to use the framework to figure out what do I need, and then to link that back through My Ben U to them finding stuff to help them to develop. What sort of tools or what sort of process have you set up for people to be able to use the framework, and I guess that's both a general workforce as well as your leaders, your people leaders. How do they actually use a framework or what tools? Is it transparent to them that they're using it, do they actually engage more directly with it? Talk to us a bit about their user experience with the frameworks.

#### **Jo Doody:**

Yeah, so we definitely have some opportunities for improvement in this space, because people need to almost opt in to use the tool. So, it's certainly embedded within our people, our position description. So it's a component of position descriptions from a recruitment perspective, it's embedded in terms of what are the capabilities we are looking to recruit for, one of the types of questions we would ask to uncover the people that would meet the needs of those capabilities, so it certainly from a recruitment perspective, more embedded. From a development perspective, there's certainly connections with our performance and development process or our impact and process, where people can be setting development goals that refer them to the people capability framework and think about the capabilities that you're wanting. In terms of tools, we've got some very simple online type tools that people can engage with in terms of a drag and drop method of doing their own self-assessment. So what's most important, what capabilities are most important to me, or what capabilities do I have strength in versus gaps in, and that links out back to our learner experience platform in terms of, "Now you can go and source some learning that might be right for you."

So it's very low touch, but we've got opportunities in the future with some current work we're doing around a more discrete assessment process for a group of our people based on some of the capabilities that will have some learning pathways attached to that. So I think it's horses for courses, with some of the people capabilities. There's a general view of how everyone can engage with it, and then there's some organizational priorities around certain capabilities that we invest a bit more time in getting them to assess and then also to do some development.

#### **Michelle Ockers:**

Okay, thanks, Jo. Is there anything we haven't talked about in regard to your capability frameworks or the use of them in the business that you'd like to talk about before we move on to Caroline?

#### **Jo Doody:**

Yeah, I think one of the key differences between our capability framework and the work we've done with the leadership is that we've been a lot more successful in driving through our leadership framework, and it's because we've invested more significantly in them, so both money and people. And we've worked a lot more closely with the business to help them to engage with it and use it in their business, not in our business. So I think that's the key difference that I see, that I've learned with the two major pieces of work around capability and leadership is that if we invest more time, money and effort in capability, we can achieve the same sort of advocacy and confidence in our business as we have good leadership. So I think that's probably the key thing that I would share with others is that you can't just build something and expect that it will miraculously develop results. You actually do need to invest in ensuring that the business connect with it and can use it.

#### **Michelle Ockers:**

Absolutely, thank you. So Caroline, let's talk about learning design. So Jo's been working on the frameworks, and Jo and her team working on the frameworks and bringing them to life. At the same time, you've been on a journey with your team around shifting learning design. So where did you start? So, it's three years ago, you've got Ben U on a page, which is strategy, you've got some solid philosophy in there. Where did you start?



## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

#### **Caroline Petha:**

Sure. We introduced, I guess, a couple of years ago, the concept of creating learning road maps with our key divisions. And that's helped us identify and then focus on those big rocks, those big initiatives which we know are going to have that impact into the business. So how we started, that was where... We've work-shopped with senior leaders in those divisions. We've work-shopped with those leaders for us to understand where are our biggest gaps, so where are our biggest... And as Jo was saying, we were working at a skills gap level, because generally we've been, it's a bit more technical in the work that we've actually needed to focus in on. So we worked with the senior leaders to understand what are the biggest gaps that we've got in your business in order for you to meet your business strategy that you've set out. So as we did these workshops with the business, we then needed help with prioritising because we had this pretty long list in some areas and we needed some help in prioritising because we could not do it all. So we went through it... And it took us a few months. It probably took us a little bit longer in the last year than what we had anticipated. But essentially got to a point where we had a learning roadmap, which was our focus for the year.

So our team's focus, it was signed off by the senior leadership teams and we track and monitor the progress against that learning map through a monthly learning postcard. So we always have, you know, endeavoured to be totally transparent with our clients in terms of what we are working on. So we send that postcard out. The roadmap is a live document because we understand that things can change and things can pop up and suddenly there's another priority. So what's happened there is we've just had the conversation then with our senior leaders to determine what might stop or pause and what might we then refocus on. So this process has actually really helped our team, my team, in terms of, so that we're not, we were talking about earlier where, you know, we would have all these sort of ad hoc requests coming in and it was very hard to prioritize and so forth. And everyone's, you know, everyone's request was more important than the other. Whereas with our portfolios, and you might remember I talked about learning design leads that were assigned to portfolios, with these portfolios and with these learning roadmaps, it means we've got that core focus or that key focus on these, what we call our big rocks in the divisions. So it's definitely been a shift for how we've worked in the past and it's working well for us.

#### **Michelle Ockers:**

So do you have one roadmap per portfolio? Is that the way it works?

#### **Caroline Petha:**

Correct. Yeah, that's correct. That's correct. Yes, we do.

#### **Michelle Ockers:**

And how do you balance out resources across portfolios? Like does everybody get, here's the capacity we're allocating to your portfolio and that's it, or, and when, what happens if one portfolio, for instance, has more work that's strategically important than another? Do you move resources around? How do you kind of negotiate your way through things across portfolios with your senior leaders?

#### **Caroline Petha:**

Yeah, no, good point, Michelle. So what we're finding now, so we know that in one portfolio, for example, we've got a lot that we are supporting our particular business on. So you're right, sometimes it's just meant a bit of a shift with some of our support resources that we've got in our team, or we bring in those external, those trusted external partners that we've got. So it's all in conversation and in consultation with our business to understand what is the sort of highest priority, but ultimately it's the impact to the business. It's making sure that we're working on the things that are going to have that biggest impact. So that's been a game changer I feel in terms of that real partnership with the business and being very close to what the business are experiencing and what their business are going through.

#### **Michelle Ockers:**

Yep, yep. So that partnership, is that something that your portfolio leads, you know, who holds the space for those relationships? Is it your portfolio leads who do that and have the strategic relationship into the business?

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

#### **Caroline Petha:**

They do, as do I, as does my leader Carmel and so forth. So I think we all play a role there and the relationships have been absolutely critical in terms of the work that we are doing with the business is building those partnerships. So it's awesome when you can kind of feel that you are deemed as a trusted advisor to the business. So, yep. So it's been really important part, Michelle.

#### **Michelle Ockers:**

Yeah. Some of the organizations I work with are at the start of the journey around building business partnering into the way they work. And I'm often asked, well, give me a really good example. What does it look like when it's mature and who's actually done it well? For somebody who's in an organization and just starting to adopt business partnering, trying to build out that model really well Caroline, what advice would you have for them?

#### **Caroline Petha:**

It's almost like getting in there and being a bit vulnerable. Like in terms of not knowing, like tell me, tell me, tell me what your, you know, tell me what the day looks like or tell me, you know, what it is that we're trying to help. What's the shift in behavior that we're looking for? It's probably just getting in there yourself to actually understand what they're going through. So I think, Jo, you mentioned as well earlier, you know, it's about us understanding what their world is and what they're going through as well. So I think as we've worked close with those businesses to understand their business, how we help them I think kind of naturally then happens, and then that's when you're really adding the value to the business.

#### **Jo Doody:**

Yeah, I agree, Caroline. Yeah, I think it's seeking to understand is critical and not trying to force your ideas or give them something, like seek to understand and then contextualise that and play that back to them is really important.

#### **Caroline Petha:**

And Michelle, that's probably been really a key thing in the work that, you know, my team do. When we kick off any sort of conversation with any of our stakeholders, it's actually, what is the problem? What's the problem we're trying to solve?

#### **Michelle Ockers:**

Yeah.

#### **Caroline Petha:**

You know, it's trying to understand what's the problem and how is it impacting people, and really getting to that, it's the old performance consulting type approach, you know? That we really just try and shift that conversation when we are talking.

#### **Michelle Ockers:**

Has it been a hard conversation to shift? Like you've been going at it three years? And again, something I often hear is people just want to keep placing the order and it's almost like we have to re-educate people and invite them to have a different conversation, and sometimes they're not ready for it or they don't want to have that conversation. Have you faced that and how have you worked through that?

#### **Caroline Petha:**

Sure. It absolutely can still... I'm always finding that if you are working with a client for the first time, people don't know what they don't know. We eat, sleep, and breathe, you know, the whole sort of learning design process. But for some people it's the first time going through it and a lot of people don't know what is involved when you are building learning. So we realize that we have a role to play as an educator to help to educate our business or our stakeholders in what is involved. So we have created a learning design methodology with some tools that everyone can use, so that it helps us to have that consistency as well within our team. But you're absolutely right. Like it can be, it's different for some people, but as we start to work with more and more of the same clients, people know what to expect.

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

#### Michelle Ockers:

And in terms of what you're actually designing, you talked a little while ago, three years ago, most of the learning was happening face-to-face and in e-learning, how has that shifted?

#### Caroline Petha:

Sure. So with the implementation of our learning experience platform, which we called My Ben U, we know that the experience now is very important. So when we think about little bite size pieces of learning, and especially when we keep, you know, when we think about our philosophies and we think about learning every day and learning in the flow of work, we know that it's access to those small bites of learning that you might need. So if I think about little videos, little animations that we are creating, we're also creating, you know, learning where it's that hybrid approach. I guess we've now realized, you know, we can, virtual sessions are working really well in our business. People are enjoying the fact that they don't have to go for two days away from the office to go and focus on something.

So we are breaking things down. And generally our virtual sessions are one and a half hours. But it's that virtual... Combination of the virtual, it's some self-paced, and if there's the need to come together in a face-to-face environment, then we're building that into our program. So there's no one size fits all. And that's what's been really important, is for us to really understand what the need is, what the problem is, what are we trying to solve, what's the behaviors we're looking at shifting, blah, blah, blah. And then thinking about what is the best learning solution to actually solve that problem.

#### Jo Doody:

And Caroline, the other piece that fits into the leadership space is that we are now thinking about the role of the leader a lot more, and particularly from a learning organization perspective, and a coaching culture is sort of language that's coming up in our organization now. Like, it's great to hear like they know the importance of coaching. And so for us, some of our learning design solutions is focused on what the leader can do with themselves and with their own teams and building out guides that they can use at a time that suits them in their business. So we're actually fully democratizing learning, and that we're almost putting ourselves out of a job sometimes. Like, here's the package, you go and do that, and how can we make sure that you're confident in using that?

#### Michelle Ockers:

Did you want to add anything here, David? Because I think this sort of is starting to bridge into the area around learning culture and ways of learning, which I know you are working on, and then your ecosystem has to support. And without going fully into the ecosystem, because there's still some things I want to ask Caroline around design. What would you add in terms of kind of the types of resources that are being provided to people to support and enable learning?

#### David Maiolo:

Yeah, so I mean, resource is a broad topic. I suppose if we start with the content first. You know, having a robust content library and robust content partners for our employees to draw on when they want, how they want has been a big part of our learning ecosystem strategy.

#### Michelle Ockers:

So that's, David, a third party content library, like off shelf?

#### David Maiolo:

Third party content... Off the shelf stuff, yeah. And what it's helped to do as well is address a lot of the low hanging fruit that Caroline's team would normally be pulled away from the learning roadmap stuff to, you know, we get these requests for learning whether that be time management or whether that be how do I build a strategy or just a small bit of learning that maybe isn't built into the roadmaps or not aligned to a learning strategy that Caroline's working on. So having those resources at our fingertips has really helped address a lot of that low hanging fruit and allows her more of the space to work on what she needs to work on from a strategic perspective. So that's one of the ways. Also, you know, the ability to discover learning and the technology that we have at our fingertips now through My Ben U and building out the systems and architecture to be able to make learning more discoverable, whether that be what we build, you know, what we buy or what we source from the web more generally.

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

**Michelle Ockers:**

Yeah. Great. So it's allowed your design team, Caroline, to get a lot more focused. Have you retired much stuff?

**Caroline Petha:**

We redesigned, it's probably fair to say we redesigned. I think COVID of course helped us along the line with that. So because we had to make that shift of course really quickly in 2020, because some of our very fundamental pieces of learning that our new starters needed, for example, in a branch and so forth it was all done face-to-face, so we had to make some shifts pretty quickly into that virtual. But that was all done, you know, really well, really well, and we've continued to tweak along the way. If I think about, you know, modules in our risk and compliance space, for example, it was all there, but we just progressively just redesigned them into just a different kind of more engaging interactive type experience. So there's been a real shift in the design of our mandatory risk and compliance. You know, modules as well.

**David Maiolo:**

Michelle, the retiring part was probably more in my space where when we were introducing the My Ben U as our LXP, we know we didn't want a bone yard of legacy content that, you know, wasn't up to date, wasn't in line with accessibility and digital requirements, was probably out of date a lot of it. So we also retired a lot of content as part of that migration. So Caroline's team obviously helped sense check that, but we did a lot of work to make sure that we cowed a lot of the crap that we had built up over the years before we introduced the new system.

**Michelle Ockers:**

Yeah. Nothing like moving house to force you to throw away old stuff you don't need anymore.

**David Maiolo:**

Yeah, yeah, that's right. Yeah. And it took a lot of time for us to sort of work out exactly the system we wanted, where we wanted to go and setting up the tech. So we did that while we were, you know, doing all that implementation work. So that was one of the first things that we actually looked at a number of years ago.

**Michelle Ockers:**

Yep. So Caroline, one final question for you and that is in terms of the structure and skillset of your team, I know you used external partners, but was there much shift required in terms of structure and skillset in your team?

**Caroline Petha:**

Yeah, there was Michelle. We needed to, with that partnering, I think when, you know, if I think about that sort of partnering and that portfolio focus that we moved towards, we knew we had to get the ability to consult, to have strong consulting capability. So that ability to be able to ask the right questions of the business. So we knew that that was quite a need that we needed to bring in. We also then with the internal capability, we knew, and I think we just know this I guess in terms of what's available nowadays for building learning and all the different sort of medium types that we can use. We wanted to bring that internally as well, so we've got that ability, you know, we've got people that can do great videos and animations and so forth. So, you know, we've got a bit of that internally, but as I said, if needed, we also sort of bring in our external partners as well. So there was certainly a shift in the capabilities within the team, yes.

**Michelle Ockers:**

So David, we've heard a little from you along the way, and obviously there's interconnections between the work of Caroline and Jo with your own work around learning ecosystem and learning culture, let's talk about learning ecosystem. It's one of those jargon terms. I got to say it. Sometimes I have a bit of an aversion to it and sometimes I quite like it, but let's get clear on what's a learning ecosystem and I guess some of your, what your basic philosophy about learning ecosystem and building them.

**David Maiolo:**

Yeah. So thanks Michelle, you're right. Learning ecosystem is a bit of a jargon term, but we did have to think about it when we started looking at where we wanted to take learning. And we knew that we wanted to improve our learning technology and create better interfaces. So we had a number of

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

aspirations I could talk about in a moment that we're working towards. But one of the first things that I did to unpack what we needed before, you can't just introduce new technology and hope for the best, right? So we needed to unpack what learning looked like in our organization. And that's where we started to look at the learning ecosystem. And if I was to draw it out, it'd look like a spaghetti. It actually did look like a spaghetti diagram where all these multiple interconnecting components sort of fit together in a crazy sort of squiggly network.

But fundamentally, what it comes down to, in my view, and if you were to Google learning ecosystem, you'd probably come up with some similar points. But there's five components that I look at. One is, our people, another is our technology and our systems architecture. We've got content and our resource integrations, the governance around learning and then the strategy and culture. So if I start thinking about, well, what do I mean by our people, so that's obviously people we've got on the call, our learning, our org cap team, the way we design, deliver, and some of the principles we put around learning. So how we work together as a function. But we've also got SME groups that are out there delivering learning, building content for their own teams and their business areas.

And with technology like SharePoint for example, they had resource at their fingertips where they could go and educate staff, but not always in necessarily the best way. So we needed that whilst delivering learning. Then we've got the leaders and learners. So there's people consuming learning. How are they consuming learning? How are these groups working, and how are they looking at learning? And then we've got, you know, how is learning... Who's involved in the support side of it from IT to our inquiries about learning and who are our specific learning cohorts and groups? So that sort of sums up the people component.

In terms of technology, we needed to really understand, well, what systems and tech did we have to support learning currently, what was working well and what needed to change? So that meant retiring some things and looking at new learning infrastructure or architecture.

And one of the key elements of that is our LXP. So that's My Ben U branded My Ben U, which is our now main hub, we call our front door to learning. So that was a key piece of the puzzle, but there were other components that we looked at as well. And also, how do the various systems that we use fit together in terms of a data perspective.

So then we talk about, we think about content, and I mentioned resource integrations and various integrations, but Caroline spoke about, and Caroline's team spoke about the way they build content. So we build, we buy and we source content. We use third parties, we use external content libraries and third parties to build our content as well. And the... What the one thing that LXP has done is allowed us to also source free content from the web a lot more easily. So we've got a whole range of content in a range of formats that we'd never had before. It's a lot that LXP has made it a lot easier for us to build content on the fly more efficient to build bite-sized learning and also being able to source content from a huge amount of either content providers that we have, that we pay for, or just free content from the web.

But then we're also looking at content types. So Jo's team and Caroline's team particularly are looking at how are they going to display learning? Is it going to be self-paced? Is it going to be digital? Is it going to be face-to-face? What's the best design for the situation? And then how do we bring that together into My Ben U or in a central location that people can access it? And I mentioned governance. So when I'm thinking about governance, we talked about those design principles and the methodologies. That was a massive part of setting up our learning ecosystem, and particularly introducing a learning experience platform in My Ben U, I wanted to make sure that when we were building and adding content to My Ben U, that it was done in the right way. So we established, I worked closely with Caroline and the rest of the team to determine what does good learning design look like using the LXP?

What principles do we need to adopt and adhere to? And also when I'm working with those SME groups out there in the business, what does that look like for them? So having standard practices and learning principles around the way we build and design, and also share and allocate learning was hugely important and that's worked out really well. Also we mentioned culling. So curation and keeping content fresh and up to date and relevant is a huge part of it. So we built in governance parameters around making sure that there was clear responsibilities for people adding learning to our

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

LXP to make sure they were curating it regularly and culling what was no longer relevant. And even permissions and security and things like that came into play. And then finally it was, okay, so how do we weave our Ben U philosophies into that, into all of that? And it was really the start, the LXP was really the impetus for building the learning organization strategy. So we now have the technology, we have the principles, we have the frameworks, we have the methodologies to bring our learning organization to life. So now it's really about continuing to go on that journey and make it a reality over the next few years.

#### **Michelle Ockers:**

There's something really interesting here about, when you talked about ecosystem, you've taken a really broad approach to here's kind of all the elements and they all have to work together.

#### **David Maiolo:**

That's right.

#### **Michelle Ockers:**

And sometimes people, when they talk about ecosystem, they just mean the tech and systems architecture rather than taking that broad perspective. So I think philosophically that's really healthy and this interplay between the culture you're trying to create and all the other elements, particularly the tech, when it came to picking an LXP or creating a functional spec, going out, doing your research and so on, can you talk to me a little bit more about sort of how you approached that with all of this other really well thought out kind of approach you'd taken, your Ben U on a page. How did that then drive the way you saw tech and how you went about picking your LXP?

#### **David Maiolo:**

Yeah. Well, we kind of knew what we wanted. So we knew, we developed the My Ben U strategy. I'd been looking at learning systems for a while, so I had an idea of the kind of things I was looking for. But we also brought in a range of different stakeholders as part of the initial consultation to determine what did we want from an improved learning system, what did that look like? We did a range of consulting to understand gaps, to understand needs from our business areas, our learners and our leaders, and also our internal team. And that helped us to develop key criteria. So when we were selecting vendors, we used a fit gap analysis. We also built out a range of personas and built out journeys of what we wanted the experience to look like. And we used that fit gap analysis and those persona journeys to help us select the right vendors. So when we were doing requests for proposals and we were getting proposals in and demos, we were using a range of selection criteria to help us select that. Not all of the... None of them really ticked all of the boxes, but the one we selected ticked a whole heap of them. So that's why we selected that vendor.

#### **Michelle Ockers:**

Okay. I like the fact that you kind of took this human-centered design approach, and you worked up your personas and thought about what's the experience we're trying to create. So that is driving the tech rather than the tech driving what you're able to do.

#### **David Maiolo:**

Yeah, I've seen a lot of instances where people see a piece of technology, they fall in love with it, and then they implement it and try to retrofit it, try to retrofit everything else into it. We really started with what were our gaps, what were our needs, and what did we want to achieve ultimately before making a selection? And that drove our decision and drove who we engage with. And a lot of the vendors that we looked at, they just, after initial conversations very clearly, they didn't fit the bill, and some of them, it wasn't even the technology, it was around their philosophies and their strategy that they had, so we really wanted to go on a journey of democratizing learning, of allowing our SMEs to build and showcase content. We wanted the flexibility to be able to define what we wanted to showcase and have social functions as part of our tech. And a lot of the providers, even though they had a lot of fancy technology, they didn't align to our philosophies. They didn't align to our strategy of what we wanted to achieve. So it really helped us having a clear idea and understanding of where we wanted to go and not really compromising on our strategy and our principles really allowed us to narrow it down to a good partner.

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

#### Michelle Ockers:

So you talked there about democratizing learning. You've talked a bit about, one, building a learning organization, and I know you helped to hold the space for learning culture. What have been the biggest shifts you've made in learning culture over the past three years? What do they look like and what has driven success in making those shifts?

#### David Maiolo:

I'm going to talk probably about some of the original aspirations we had for My Ben U. So one of them was providing a single front door to learning. So we've had learning housed in a variety of different systems and places. And one of the key pieces of feedback that we received from our organization was that it was too hard to find things. People couldn't discover learning easily, and they had to go to too many places to find it. So one of our biggest priorities was to bring learning together into one place and provide a single front door which is now our LXP. So that meant setting up integrations, decommissioning some systems and working out how to bring everything together into one place. So that in itself, for people to be able to go to one central hub for learning, meant that suddenly learning was much more at their fingertips. They didn't have to go to five or six different places to get it. And when we were building those learning experiences, we could showcase it in one place as well. It also meant we can use our LXP to showcase learning in one place, so we can help people find and discover it. So we want people to learn every day. So everything was about bringing information together into one place to be able to facilitate that.

#### Michelle Ockers:

Right.

#### David Maiolo:

The next bit is really about learning in the flow of works. So Caroline and Jo both mentioned that, but that was, again, about our content libraries having really robust content and making that content easy to consume and more bite size. So a large part of the journey that we've been on has, and the technology has really helped instill that because it's built around creating bite size learning and building that out into individual assets pathways or longer journeys. So the technology itself has shifted us in that direction and reinforced that, but now Caroline's team and Jo's team there, where they may have been building longer, maybe 15-minute modules around e-learning modules, they're much more focused now. And we worked on this together to be able to build bite size micro-learning, and be able to package that up in a way that is a lot more consumable and a lot more discoverable for our learners.

So one of the biggest shifts now has been our learning is a lot simpler, cleaner, easier to consume, and we add a lot of metadata to that so people can discover it. So now, rather than not being able to find it, they type in a search word that relates to the learning in one shape or form, they can easily find that learning. And it doesn't bring up a lot of rubbish because we're very specific about the metadata and the taxonomy that we use in the background and the tags that we use.

#### Michelle Ockers:

Yeah. A well thought out approach to the metadata and the taxonomy is really critical. I'm just going to, I'm going to pop for listeners in these show notes a link to a recent conversation we had on learning with Catriona Malcolm from Westpac, where we talked with her about how they went about developing their taxonomy and how that serves them well. So I think anyone who's responsible for creating, improving discoverability of learning and of resources as well as ease of maintenance of them, tackling your taxonomy is really critical, right?

#### David Maiolo:

Yeah, exactly. It is. And probably the last point I'll talk about is just having the mindset of putting our learners in the driver's seat. So historically our learning culture has come from an environment, we're highly regulated. We're a bank, and we need to be compliant around a range of things. And that has led to assigning learning and making sure that people are across their obligations. And success has been measured by have people completed their mandatory learning? So we still want that, but we also want to make sure that our focus is on people's growth and people's development so they can advance their career. They can keep pace in a modern workplace. So rather than always assigning, we are doing more social things, we're communicating, we're sharing learning, we're encouraging leaders to share learning, encouraging those conversations.

## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

And we needed the technology to help us get there. But a lot of it is around a cultural shift of not just assigning things and hoping for the best, but also starting to look at how do we start to see shifts in behavior? How do we start to see shifts in people's actions and what they're doing? And also making sure that we're tracking consumption of learning. So it's not just around hitting all your compliance targets. It's now around broader learning consumption and driving that behavior of everyday learning that we've talked about. So learning consumption more broadly has been a big focus for us over the last couple of years. But there's other things now that we we're trying to focus on more, which is around how do we evaluate a return on investment and a success of learning in terms of actual business outputs.

#### **Michelle Ockers:**

So I'm going to start wrapping up this bumper episode with a question, a fairly rapid round. If I can get each of you to nominate what you think has been one really vital critical success factor to making the shifts that you have made, what's one thing that's really contributed to your success to date? So I think we'll start with yourself, Jo.

#### **Jo Doody:**

Yeah, I think it's partnering with the business, so you don't do it to the business, you do it with the business.

#### **Michelle Ockers:**

Great. Thank you. Caroline, a different one from yourself. I know you'd echo Jo, but a different one that you'd like to add.

#### **Caroline Petha:**

I will echo Jo, but you know what I want to add, because I think I've forgotten this earlier, is our partnerships also with our internal sort of people and culture colleagues. I know with a lot of the work that we've been doing and I've spoken a lot about that close relationship with the business, we work very closely with the change managers as well, or our senior people partners that are a part of our broader people and culture. So I think that's probably an extra part for that partnership one there, Michelle, that I've probably forgotten to mention earlier.

#### **Michelle Ockers:**

Yeah. Okay. Thank you. Would you like to squeeze in one more?

#### **Caroline Petha:**

Ooh, understand, I guess. But it comes in, for me, it's all about that partnership and understanding the business so that we are able to, from my team's perspective, design learning in the right context.

#### **Michelle Ockers:**

Great, thank you. And David, another critical success factor from yourself?

#### **David Maiolo:**

Yeah, for me it's, well there's probably two. One is having a clear vision of where you want to go, but it's really the sum of all the parts for me. The way our team works together and being a cohesive unit and really that broader ecosystem. So understanding where the gaps are, what you need to address, keeping that in mind and chipping away of it and not losing sight of that, because it can be a long, long slog. So just making sure that you're continuing towards that vision and you don't sort of lose momentum.

#### **Michelle Ockers:**

Great. Thank you. And I know we didn't talk about it specifically in the episode, but I hope it's apparent to listeners how closely all three of you and your teams are working together through the way you've spoken about your work and the overlaps in the things that you're working on together. So thank you so much, Caroline, Jo and David for joining us today. We'll pop a link to your LinkedIn profiles in the show notes if anyone would like to get in touch with any of you. I feel like we've only had the opportunity in some ways to scratch the surface in this conversation today. So thank you so much for joining me to have this conversation and sharing your work and this ongoing body of work you're trying to go in with learning transformation at Bendigo Bank.



## Learning Uncut Episode 125

### Bendigo Bank's Learning Transformation – Caroline Petha, Jo Doody & David Maiolo

**Jo Doody:**

Thanks, Michelle.

**David Maiolo:**

Thank you.

**Caroline Petha:**

Thanks Michelle. Thanks.

**David Maiolo:**

Thanks for having us.



#### About Learning Uncut

Learning Uncut are learning and development consultants that work with learning teams and/or business leaders to accelerate learning transformation. We specialise in supporting organisations to create or update their learning strategy, enhance their learning team's capabilities, align learning to business value, and implement modern learning approaches.

We are highly collaborative and pragmatic. We partner with organisations to align learning to their business needs, unleash continuous learning, and build capability to help them thrive.

Learn more about us [at our website](#).

#### About your host, Michelle Ockers



Michelle is the founder of Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year* – for outstanding contribution to the practice of learning and development
- Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning



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