



## Beyond Order-Taking: Creating Meaningful Stakeholder Engagement Chatbox

11:01:56 From Dawn Wiley to Everyone:

Hey everyone. Happy Friday! I'm off camera while I eat my lunch.

11:02:21 From Connie Halvorsen to Everyone:

Happy Friday!

11:02:42 From Noel Zykowski to Everyone:

Hey friends!!

11:02:55 From Stella Lindeke to Everyone:

Sunny greetings from Germany!

11:03:59 From Andrew Jacobs to Everyone:

Go Saints

11:05:33 From Maureen Flanagan to Everyone:

It is a timely topic as we prioritize our 3Q portfolio!

11:06:18 From Mark Butsavage to Everyone:

Mark Butsavage

11:06:25 From Carol Sheetz to Everyone:

I haven't been here for a while! I'm back . . . . !!! 🙌

11:06:25 From Andrew Jacobs to Everyone:

Haven't been here for a while

11:06:41 From Shari Sprack to Everyone:  
who are you calling old...lol

11:06:45 From Juliana Casati to Everyone:  
Hi, I'm Juliana Casati 😊

11:06:47 From Connie Halvorsen to Everyone:  
Welcome everyone!

11:06:47 From Mark Butsavage to Everyone:  
OLD PEOPLE 😂

11:07:02 From Jason Dreyer to Everyone:  
Welcome new people and returning people :)

11:07:34 From Shannon Tipton to Everyone:

<https://www.learningrebels.com/2025/04/10/the-2025-edition-from-ld-order-taker-to-strategic-business-partner/>

11:08:03 From Heather Varney to Everyone:  
I watched this webinar yesterday and it had excellent points on what L&D needs to do in this fast accelerating AI world. <https://www.trainingmagnetnetwork.com/events/4127>

11:09:37 From Jessica Koleno to Everyone:  
Can you link the document you were referring to? I don't think I got the email for some reason

11:09:54 From Jason Dreyer to Everyone:

<https://www.learningrebels.com/2025/04/10/the-2025-edition-from-ld-order-taker-to-strategic-business-partner/>

11:10:04 From Heather Varney to Everyone:  
Eating breakfast at the moment, but give me a few mins

11:11:02 From Jennie Glunz to Everyone:  
Gilbert's Grid-esqe conversations are a super power for L&D partners

11:11:43 From Shannon Tipton to Everyone:  
OH! Link please Jennie!

11:12:19 From Andrew Jacobs to Everyone:

The conversation needs to clarify what we want and expect - Strategic means org/sector/functionwide, looking 12-24 months. Business means THEIR performance and business results. Partner means a relationship which requires brokerage to create expectations, realisations, and roles.

11:12:30 From Dawn Wiley to Everyone:

I'm there right now with a course that everyone thinks needs to be updated to address a business problem. I think a lot of it is not a training issue and yes, the training has room for a lot of improvement. Considering using Cathy Moore's Action Mapping as a process. It will be my first time it and would love insights from others who have used it.

11:12:37 From Carol Sheetz to Everyone:

@Jennie Glunz, I'm not familiar. Can you share more?

11:13:00 From Erica Beggan to Everyone:

@Jennie Glunz - this?

<https://www.thinkingkaplearning.com/blog/behavior-engineering-model/>

11:13:17 From Jennie Glunz to Everyone:

This is a super old version and it doesn't have a source so a Google search might have better resources.

11:13:18 From Victoria Nelson to Everyone:

In general when I receive a training request, I like to first ask what's behind the request, what are the pain points, and what does success look like.

11:13:20 From Jennie Glunz to Everyone:

Copy of Performance Diagnosis Checklist-Gilberts Grid.pdf

11:14:46 From Carol Sheetz to Everyone:

At my organization, the solution to frustrations is always, "did they learn that in training?" Well, yes, they did, but are you REINFORCING our training when they're in their role? More training is NOT always the answer. Direct supervisor support is huge! Let them put their training in ACTION!

11:14:50 From Jennie Glunz to Everyone:

Replying to "@Jennie Glunz - this? <https://www.thinkingkaplearn...>":

Yes - that is a prettier version

11:16:12 From Carol Sheetz to Everyone:


first word again?

11:16:27 From Shannon Tipton to Everyone:  
strategy

11:16:40 From Stella LIndeke to Everyone:  
odds?

11:17:00 From Jason Dreyer to Everyone:  
Replying to "odds?":  
Ops

11:17:34 From Shannon Tipton to Everyone:  
Strategy, Ops, Transaction and in the middle Tactic

11:18:10 From Stella LIndeke to Everyone:  
Replying to "odds?":  


11:20:25 From Heather Varney to Everyone:  
ok, done eating now.

11:20:46 From Andrew Jacobs to Everyone:  
Help me understand

11:23:37 From Jennie Glunz to Everyone:  
and slow down to assess ... human behavior is super complex

11:24:03 From Shannon Tipton to Everyone:  
Replying to "and slow down to assess ... human behavior is super ...":  
Truth statement right there!

11:24:18 From Andrew Jacobs to Everyone:  
Replying to "and slow down to assess ... human behavior is super ...":  
This where strategic and tactical approaches focus on performance measurement, not counting learning activity

11:24:36 From Andrew Jacobs to Everyone:  
Absolutely!

11:26:05 From Maureen Flanagan to Everyone:  
Building trust is key. We don't organizationally necessarily account for that time investment; having some quick wins can help to build trust with others.

11:27:16 From jessica crawford to Everyone:

I saw that and it was very good. It is available to watch on the training magazine site.

11:27:54 From Andrew Jacobs to Everyone:

I talk about the 4Cs a lot:

Collaboration - this is where we want to be but requires us to agree with their outcomes and theirs with ours

Cooperation - we have different objectives from the business but we work with them to create effective elements which support both

Coordination - we can't help the business but get out of the businesses' way so they can do their thing

Competition - we're trying to get attention and fight for awareness with every other team, e.g. facilities, IT, Finance, etc

11:27:58 From Erica Beggan to Everyone:

Replying to "Building trust is key. We don't organizationally n...":

Agreed! I think this is where "being agile" can effectively come into play - find ways to make those smaller meaningful wins because it will help smooth the path forward as you continue to move throughout the project process.

11:29:16 From Andrew Jacobs to Everyone:

Slide1.PNG

11:30:25 From Heather Varney to Everyone:

We could be at or are already at the point where we have to justify we are worth keeping vs. replacing with AI or a combo. So evolve we must to survive.

11:30:57 From Kat C to Everyone:

Question for group thought on the current discussion: How can we then leverage AI to measure L&D impact and pivot our value?

11:31:17 From Dawn Wiley to Everyone:

Replying to "Slide1.PNG":

Thx! Mine looked nothing like that

11:31:42 From Jennie Glunz to Everyone:

Replying to "Question for group thought on the current discussi...":

Super simple one - summarizing, building headlines from open ended feedback

11:32:50 From Mark Butsavage to Everyone:

All leads back to the iron triangle for projects: good, fast and cheap, you get to pick 2.

11:33:26 From Mark Butsavage to Everyone:

AI may be fast and cheap, but is it really good?

11:33:36 From urbie delgado to Everyone:

AI removes the yuck stuff IDs do. I like having AI mimic the client so I can practice value-added conversations with the real deal

11:33:58 From Andrew Jacobs to Everyone:

Replying to "AI may be fast and cheap, but is it really good?":  
It's getting better ALL the time.

11:35:20 From Heather Varney to Everyone:

I see it as not waiting to be invited to the table but rather seeking out opportunities, issues to solve through learning methods that work in today's world. Show them how it will solve their issues, not wait for them to tell us what they want.

11:35:19 From Jennie Glunz to Everyone:

Maybe a provoking question but I often ask - are we checking a box or do we want to actually have an impact (change behavior, improve results, etc)

11:36:11 From Dawn Wiley to Everyone:

Replying to "Maybe a provoking question but I often ask - are w...":  
Yes! This is the world I have just stepped into (compliance heavy) and want/need to change.

11:36:38 From urbie delgado to Everyone:

Most of my clients the last several years have read Training for Dummies. So developing an ongoing relationship of show & tell to increase their know-how and efficacy has lead to me having a higher value consultant role. Let go.

11:36:46 From Andrew Jacobs to Everyone:

Replying to "Maybe a provoking question but I often ask - are w...":  
Agree. More worried about going BUSYNESS than changing BUSINESS

11:36:50 From Kat C to Everyone:

It sounds like bridging OD and L&D is essential.

11:36:53 From Erica Beggan to Everyone:

Andrew V. makes a good point; in coaching, we call it mirroring the client's language. Once we start to use synonyms and veer to far away from what they said, it's easier to muddy the communication and lose track of what they are actually saying.

11:37:02 From Andrew Vercooteren to Everyone:

What to do: Learn to speak business speak.

11:37:18 From patti swiech to Everyone:

Replying to "Maybe a provoking question but I often ask - are w...":

That is a great question because we base our decision to only create training that will change a behavior or improve a skill that we can measure.

11:37:24 From urbie delgado to Everyone:

Nonono..they do know. A lot of them do.

11:39:05 From Andrew Jacobs to Everyone:

Who said it had to be 4 hours? Where did that come from?

11:40:14 From Jason Dreyer to Everyone:

Replying to "Who said it had to be 4 hours? Where did that come...":

That was a question I asked as well. Is it an OSHA requirement or what they think it should be.

11:40:30 From urbie delgado to Everyone:

We're all under the gun to improve our value to the organization. L&D is a lot like project management. Ditto for the stuff's clients do. We're more alike than we're different

11:40:50 From Andrew Jacobs to Everyone:

Replying to "Who said it had to be 4 hours? Where did that come...":

The focus is on the transactional data then, ie outside the triangle. What is the tactical approach?

11:40:58 From Maureen Flanagan to Everyone:

As @Dawn Wiley mentioned earlier, Cathy Moore's Action Mapping is a great approach for focusing on the behaviors and scenarios and the compelling case for change that needs to occur in the organization.

11:41:39 From Andrew Jacobs to Everyone:

I steal RACI modelling from project management to work out who needs to do what

11:42:11 From Heather Varney to Everyone:

yes!

11:42:28 From Dawn Wiley to Everyone:

it begins with focusing on their needs, the things that keep them up at night or are giving them ulcers or that they are being measured on

11:43:11 From urbie delgado to Everyone:

It begins at the moment of need. L&D opens with curiosity.

11:43:41 From Andrew Jacobs to Everyone:

Replying to "it begins with focusing on their needs, the things...":

It's a great shout DAwn. And we walk in and offer courses...No wonder they look at us as a bit weird

11:45:10 From urbie delgado to Everyone:

Indiana Jones would have made an amazing L&D practitioner. 5 whys.

11:45:15 From patti swiech to Everyone:

@Jennie Glunz So agree! I am in the same situation as you by sitting in the sales training organization and responsible for their training so spot on with your observations

11:45:33 From Andrew Jacobs to Everyone:

Replying to "Indiana Jones would have made an amazing L&D pract...":

I need to get that hat

11:46:49 From urbie delgado to Everyone:

Indy feared snakes. L&D fears "We just need a PowerPoint."

11:47:39 From Maureen Flanagan to Everyone:

Supplemental to Gilbert's grid, Mager and Pipe have a great flow chart and approach to analyzing performance problems.

11:47:41 From Erica Beggan to Everyone:

Which has been crystalized into - is it will or is it skill?

11:47:43 From Maureen Flanagan to Everyone:

Copy of Performance Diagnosis Checklist-Gilberts Grid.pdf

11:48:41 From Maureen Flanagan to Everyone:

Replying to "Indy feared snakes. L&D fears "We just need a Powe...":  
PowerPoint?! Why did it have to be PowerPoint?

11:48:45 From Andrew Jacobs to Everyone:

There's nothing to stop you looking at the requirements and seek out the outcomes which are expected, rather than the inputs. Have a conversation with the appropriate organisations. There are many myths, especially in compliance. It keeps the market fixed in a volume delivery model.

11:49:14 From Andrew Vercouteren to Everyone:

That end result becomes the North Star for the solution.

11:49:22 From Michell Benoit to Everyone:

Replying to "Which has been crystalized into - is it will or is...":  
This is the same question I ask, in the same way.

11:50:03 From Erica Beggan to Everyone:

Replying to "Copy of Performance Diagnosis Checklist-Gilberts G...":  
@Maureen Flanagan - is this a different version than Jennie G. offered?

11:50:37 From Jason Dreyer to Everyone:

Monday

11:51:14 From Heather Varney to Everyone:

Often when you get into those types of conversations, you discover more organizational issues vs. a training issue. So that can be a way of helping them see that training comes after the other organizational/process issue is fixed, and we're glad to assist in that whole process. We are project mgrs too in that sense.

11:51:57 From Erica Beggan to Everyone:

Which AI can't do 😊

11:53:16 From Erica Beggan to Everyone:

I check them out on org chart, and even go look at their LI profile

11:54:08 From Andrew Jacobs to Everyone:

It's the Tom Peters concept of MBWA

11:54:48 From Andrew Jacobs to Everyone:

[https://en.wikipedia.org/wiki/Management\\_by\\_wandering\\_around](https://en.wikipedia.org/wiki/Management_by_wandering_around)

11:55:24 From Maureen Flanagan to Everyone:

Replying to "Copy of Performance Diagnosis Checklist-Gilberts G...":

Somewhat different. Most models stem from Gilbert's work. :-) This one is more focused on an individual vs the entire organization, but I like how it does go deeper into those things that are not skill deficiencies.

11:56:08 From Andrew Jacobs to Everyone:

At the point you think people are fed up hearing your messaging is the point where they are 'just' beginning to recognise you.

11:56:59 From Andrew Jacobs to Everyone:

You can CHOOSE to make a decision to do something today?

11:57:12 From Brandon Pachey to Everyone:

Seek out SMEs

11:57:27 From Jennifer Wilson to Everyone:

For sure I am using help

Me understand. I think I did get in my soapbox a little too much so this conversation was timely and humbling :)

11:57:39 From Heather Varney to Everyone:

do some more networking

11:58:07 From Andrew Jacobs to Everyone:

If anyone wants to decide to connect and chat through this, feel free!

<https://www.linkedin.com/in/andrewjacobsInd/>

11:59:14 From Dawn Wiley to Everyone:

I'm going to incorporate some of the Gilbert's Grid questions into my upcoming client conversations

12:00:00 From Stella LIndeke to Everyone:

Thank you so much Shannon for organizing and facilitating this great coffee chat.

12:00:14 From Carol Sheetz to Everyone:

Replying to "For sure I am using help Me understand. I think I...":

Same! Help me understand!

12:00:33 From Jennifer Wilson to Everyone:

Gotta run! Great to be back!

12:00:40 From Carol Sheetz to Everyone:

Thank you, Shannon! It's great to be back, and I hope I can continue to attend!

12:01:08 From Carol Sheetz to Everyone:

I love it! 🙌

12:01:16 From Andrew Vercouteren to Everyone:

Thank you for a great conversation!

12:01:21 From Denny Zajac to Everyone:

I wish more trainers would speak up because in some cases, they have a better understanding of how business processes cross different functions (more than employees working within a single function).

12:01:30 From patti swiech to Everyone:

Thanks for a great conversation today!!!

12:01:32 From Andrew Jacobs to Everyone:  
Brilliant to re-connect and meet you all!

12:01:36 From jessica crawford to Everyone:  
Thank you. this was my first time and i love the conversations that we are having here. i will see you next time

12:01:36 From Dawn Wiley to Everyone:  
Thanks everyone! Great as always

12:01:50 From Andrew Vercouteren to Everyone:  
Welcome, Jessica!

12:01:52 From Heather Varney to Everyone:  
taxes was last weekend for me. lol

12:02:07 From Carol Sheetz to Everyone:  
I'll be reading and playing Hello Kitty Island Adventure!

12:02:13 From Carol Sheetz to Everyone:  
I LOVE INTO THE WOODS!

12:02:29 From Denny Zajac to Everyone:  
Playing with grandchildren!

12:02:31 From Carol Sheetz to Everyone:  
The movie isn't awful!

12:02:44 From Jason Dreyer to Everyone:  
Aunt's 75th birthday party

12:02:48 From Connie Halvorsen to Everyone:  
Thank you, Shannon, and everyone else! Have a great weekend everyone!

12:03:06 From Dawn Wiley to Everyone:  
I like even the bad musicals

12:03:26 From Andrew Jacobs to Everyone:  
I am going to be practicing more image prompt quotes for Chat GPT...

12:03:30 From Maureen Flanagan to Everyone:  
Getting together with two girlfriends to plan our itinerary for a long weekend road trip in

two weeks. (I drafted an itinerary on ChatGPT, but need to pin down restaurants with gluten-free menu options so we can make reservations.)

12:03:55 From Erica Beggan to Everyone:

Replying to "The movie isn't awful!":

Okay, thanks for letting me know. I've been shy to it.

12:04:10 From Maureen Flanagan to Everyone:

Is there anyone here from the Hudson Valley in NY that has some must-see places and restaurants?