



### Dell Develops Global Finance Team through Innovative Mix of Online and On-Site Learning



*“TRI Corporation is well-known to be one of the best providers of advanced financial simulation models. During the course of Dell’s relationship with TRI, it became apparent that, beyond simulations, they also excel at developing curriculum that integrates soft and technical finance skills, all based on a set of competencies.”*

**Alicia Davis**

**Director of Global Finance Learning and Development**

In 1992, eight years after Michael Dell launched his computer business from a dorm room at the University of Texas, his eponymous company, Dell Inc., made Fortune’s list of the 500 largest corporations in the world. Today, Dell has risen to the ranks of the Fortune 100; the technology giant is one of the largest providers of integrated technology solutions worldwide, with well over 100,000 employees. Like many other multinational organizations that provide formal educational programs to their future financial leaders, Dell considered the pros and cons of both virtual and physical classroom settings to engage participants in far-flung locales. Unlike most other organizations, however, Dell ultimately chose to include elements of both. The technology giant turned to the experiential learning expertise of TRI Corporation to develop three innovative programs whose combination of virtual and face-to-face training has armed Dell’s financial talent with the tools they need to expertly manage business challenges across the globe.

#### Overview

**Country or Region:** Worldwide

**Industry:** Information Technology

#### Customer Profile

Headquartered in Round Rock, Texas, Dell Inc. is one of the world’s largest providers of integrated technology solutions.

#### Business Situation

With more than 100,000 employees worldwide, Dell sought an innovative solution to the challenge of delivering financial education programs to promising financial talent at various levels of experience and in locations across the globe.

#### Solution

In 2009, Dell retained TRI Corporation to design, develop and implement simulations and curriculum for three experiential learning programs targeting entry-, mid- and executive-level finance professionals. The programs provide an opportunity for participants around the world to connect in virtual and face-to-face settings as they work in teams to develop financial leadership skills.

#### Benefits

- ▶ Increased finance and business acumen at every level
- ▶ More collaborative environment
- ▶ Global consistency in measuring financial results and providing analytics
- ▶ Work culture fostering long-term stability
- ▶ Strong bench of future leaders
- ▶ Less dependence on recruiters

#### Situation

Dell maintains a robust, global intern program from which it recruits up to 70 percent of its entry-level employees. Historically, the company hires non-MBA graduates, preferring to identify promising, self-starting undergrads through its intern program and train them in-house with the financial business acumen they need to mature into business leaders. Precipitated by Brian Gladden’s arrival in 2008 as chief financial officer, Dell embarked on an ambitious effort to create a more robust development roster at various experience tiers. It would enhance Dell’s existing mid-level financial education program, which was originally introduced in 2002, and add two new programs at the entry and rising executive level.

experience; and the new Global Financial Excellence Program for employees of 10 or more years who are crossing the executive threshold.

While other global organizations opt to conduct educational programs either online or in regional classroom settings, Dell chose a combination of the two to deliver its curriculum – an approach unique to the Austin-based company. It is also one with distinct advantages, as tomorrow’s leaders learn to work both virtually and face-to-face to make challenging business decisions, according to TRI founder Tom Conine.

On the recommendation of Gladden, who had crossed paths with Conine earlier in his career at GE Crotonville, Alicia Davis, Dell’s director of global finance learning and development, brought in TRI to help structure the third and most advanced of the programs, the GFEP. Since that initial assignment, TRI’s role has expanded to include the development of

#### Solution

Dell worked with TRI to develop simulations and build curriculum for programs at three educational tiers: the new, entry-level Financial Development Program; the existing Financial Rotation Program for those with five to nine years of

*(Continued...)*

## For More Information

To learn about how TRI Corporation experiential learning services can benefit your organization, visit [www.tri-simulation.com](http://www.tri-simulation.com), or email [TRIContact@tri-simulation.com](mailto:TRIContact@tri-simulation.com).

For more information about Dell, visit [www.dell.com](http://www.dell.com).

## Solution continued

simulations and curriculum for all three educational tiers.

Within each program, TRI simulations require teams make real-world business decisions on behalf of a hypothetical company. The simulations are based on off-the-shelf TRI products that have been tailored to Dell's needs by introducing vignettes that mirror actual challenges in the organization's history, from supply shortages to navigating the economic crisis, as well as terminology specific to Dell and the tech industry.

Conducted in a combination of virtual and live settings, the simulations are highly competitive and grow increasingly complex with each level. Participants must take into consideration a host of issues related to Dell's business, from pricing, production and cost to new products and market direction. New challenges are introduced as the simulation progresses, forcing teams to perform, as they would in the real world, within a set of rapidly changing circumstances.

The virtual component of the simulations is delivered primarily by conference call, connecting participants from around the world. Videoconferencing, facilitated by Adobe Connect and conducted from Dell's purpose-built videoconferencing rooms, is introduced at key points within the process.

**Financial Development Program** - This two-year program is designed for Dell's global network of recent undergrads, and provides an opportunity to launch a career in finance. The focus is on Dell's core competencies, which

include financial and business acumen, control-ership and critical thinking. Participants rotate into four different global finance assignments, each lasting six months.

"We initially contracted with TRI to create a simulation for the third semester of the FDP," said Davis. "After that, we circled back to streamline the entire course." As a result, TRI is the primary builder for the FDP from a curriculum standpoint as well.

**Financial Rotation Program** - This mid-level program targets those with seven or more years of work experience, at least one year of that at Dell. It addresses the same competencies as the FDP but at a more advanced level, focusing on strategic thinking and advanced business acumen. Participants develop effective leadership qualities through three consecutive one-year assignments that can include a non-local country assignment. They gain key skills and experiences in various aspects of the Dell organization, and are exposed to a variety of leadership styles through executive mentoring relationships. At the FRP level, TRI runs a simulation and conducts live meetings on topics ranging from TRI business equations to critical thinking skill development, understanding global change and being able to assess an M&A target.

**Global Finance Excellence Program** - Dell's highest-level program, tailored to management-level team members, is focused on developing advanced finance skills of a technical nature. For 18 months, participants receive complex training modules to enhance their critical thinking and analytical skills, preparing them for future leadership positions. The GFEP contains elements of executive leadership training, strategic thinking activities, and an extremely challenging simulation in which participants take on the role of CFO or CMO of their organization. The simulation focuses on meeting commitments and risk management in order to prepare participants for executive leadership. They are challenged to consider the ramifications of various decision paths, leading to the recognition, according to Davis, "that when they lead a team at that level, they need to heighten their decision-making."

Dell's successful collaboration with TRI has led the company to revisit a popular course on finance for non-financial staff that had been tabled several years ago. A new incarnation of that program is now under development by TRI, as is a new simulation tailored to Dell's supplier management program. "We continue to grow our relationship

## Benefits

Dell's significant and ongoing focus on financial staff development has shaped a corporate culture in which its executives focus on building long-term careers within the organization versus using their experience as a stepping stone to outside opportunities. This has fostered stability and created an exceptionally strong leadership bench for Dell. The company has also benefited from greater consistency throughout its organizations in the tools used to measure financial results.

Of the simulations in particular, the combination of virtual and face-to-face learning has proven to prepare Dell's future leaders well for the realities of managing teams who are scattered across the globe. In addition, participants have learned to be effective managers in stressful situations, reports Davis. "All have realized various aspects of finance where they have an opportunity to improve. It moves them and their thinking to the next level."

Davis points to a collateral benefit as well. "Even though teaming and collaboration are not called out as a program objective, participants learn a lot about themselves and how they treat other team managers."

"Feedback from participants," she adds, "has been glowingly positive."