# How Teladoc Health Created Budget-Friendly Global L&D Programs

**On June 5th, Intelligent Enterprise Leaders Alliance founder Rob Shannon had a captivating conversation with Carrie Berg, Vice President of People Experience, Learning & Development at Teladoc Health. During the engaging LinkedIn Live conversation, the pair dived deep into the innovative approaches Teladoc Health employs to create budget-friendly learning and development (L&D) programs that are both effective and scalable.**

**Explore the enlightening interview below.**

**Rob Shannon:** Hi, everyone. Welcome to Intelligent Enterprise Storytellers. My name is Rob Shannon. I'm the managing director and founder of the Intelligent Enterprise Leaders Alliance. And today it's my absolute pleasure to welcome Carrie Berg to the program. Carrie's the vice president of people experience learning and development at Teladoc health and also one of our speakers at the people analytics exchange taking place later this month in Minneapolis.

Still plenty of time for those of you that have not yet registered to do so. We're really looking forward to that. Carrie, welcome to storytellers.

**Carrie Berg:** Thank you. Happy to be here.

**Rob Shannon:** Well, thank you for taking your time and thank you to everyone out there listening in today. We really hope you enjoy the conversation.

We have some fantastic insights that I know Carrie is going to be sharing with us. And first, Carrie, before we jump into some of the topics that we've talked about in advance of this session, I was hoping you could share with our viewers a little bit more about Teladoc Health for those that might not be familiar with the organization.

**Carrie Berg:** Sure. So Teladoc Health is a virtual health care provider. Feel free to Google us and check out our web page. We are approximately 5,500 employees. located globally. And you know, our primary goal is to bring health care to everyone everywhere and allow everybody lives. So we have a very diverse employee base primarily remote and we have a lot of training needs and training audiences because we are a healthcare provider.

We've got medical providers. We have employees that, that work with our patients and our members, and then we have the employees of the organization themselves. So it's a very fun, rapid growing organization and I encourage everybody to take a look.

**Rob Shannon:** Absolutely. And really important mission about bringing healthcare to everyone, particularly around the world.

And I know we're going to talk about some global. topics a little bit later. Topic of today's session, which is going to be important to everyone who's always on a budget, right? We don't have unlimited funds, but it's about how Teladoc health has created budget friendly L and D programs. And that's kind of the first subject I wanted to jump into.

And I know when you and I have spoken before, you've talked about the culture that you came from previously, where there really wasn't a formal training and development agenda. And that's probably not all too familiar for a lot of people out there as well that came from similar experiences. So I was hoping how you can share with us how you helped instill a learning culture within Teladoc health on a limited budget.

**Carrie Berg:** Sure. Well, I will just admit, I think it's always a work in progress. A learning culture evolves because technology involves and the employees evolve. And so it's always kind of a moving, moving target and you need to make sure you have some fundamentals in place. I think number one is having leadership that's aligned to the fact that learning is important and it happens in a lot of different ways.

And sometimes we are learning when we don't even know that we're learning. And it's important to call that out and to recognize that. Number two is I have a really amazing team. And I am really lucky to have a team of fantastic L& D specialists, managers, and all of that who make a lot of things happen and, and in an amazing ways.

So I think having a great team talent is incredibly helpful to doing this. And I know there's a lot of people out there who are probably a department of one or maybe two and you're acting like double the size. And so I totally respect and understand that I have often been in that, in that spot, but there's a lot to be said about the people, talent within your L and D that can help make things happen quickly and at a low cost.

But I think also you know, managers across the board at all levels also have to be supportive of leader of employees learning. You can learn something in five minutes in 10 minutes. We all Google stuff all the time. We all Wikipedia stuff all the time. So if we can create an environment where people are a little bit more driven to look up things and to self serve. It's even better. And sometimes we have to create the platform to do that. So we are a Microsoft organization. We use SharePoint. So by creating some good SharePoint pages that link to resources that we've been able to find for free and creating an action for employees to engage in that is a great way to kind of build that learning spirit and culture, and that can all be done through SharePoint for relatively low cost.

**Rob Shannon:** well, there's so much to unpack there in particular, the learning culture aspect of that. You also talked a little bit about stakeholder involvement, communicating the value of learning and development. These are all things that we're going to sort of touch on as we go throughout the interview here today.

But we talked a little bit about the global, you talked about the global nature of Teladoc earlier in your intro, and I was curious about the challenges and the opportunities. And maybe some of the outcomes that you've seen being part of a global training program. Surely there's also a lot of opportunities and challenges.

So I was just hoping you can talk to us a little bit about learning in a global environment.

**Carrie Berg:** I think that the first thing that's really important is we, we try to make our programs as inclusive as possible. And it's a challenge because for majority of our global employees, English is a second language and however, you learn English as a second language.

The same word can mean. Something to somebody, you know, in India. It could also mean something different to somebody in Argentina and means something different to somebody in Spain. So we need to try to create programs that feel super inclusive that are not to that are not complex with language and are simple concepts that apply to anybody and everywhere.

And so that even if you're reading and interpreting and taking in the content, you know, Where English is not, you know, your area of expertise, but you, you know it enough to speak it and to get things done. You can still understand the concept that we're trying to get across. So I think that that is tremendously important.

You know, I also think that it's super critical to. try to advertise and communicate your programs as much as possible. You're on different time zones. The access to things is very, very different. So, you know being able to make the programs kind of on demand as much as possible, or when we have live sessions, we have to say like, Hey, this is not going to be at a great time for you.

It may be in the evening and maybe cutting into your dinner hours, or maybe in the wee hours of the morning. It's only for 6 to 8 weeks. Hopefully you can make it work and participate. But it's really also just about setting expectations. Yeah. And so, you know, what comes to mind and listening to describe the environment that you've created at Teladoc is maybe the impact on retention.

So often workers and employees, when they're coming into an organization, particularly when they're newer, they talk about the need for, and the desire to be grown and developed within the organization, which in turn may, and hopefully lead to increased retention. Are you able to maybe share some findings along those lines?

If in fact, the things you're experiencing a tell about. Yeah, so I think we have found that employees who participate in our programs tend to stay with the organization. You know, they feel tethered to the to the company, to our purpose, to our mission and our vision. You know, so I think that it helps to Encourage employees to participate.

It's also again, kind of going back to the manager, ensuring that the manager sees the value in it. And they encourage the employee to participate and they give them the time to participate. That's also really key. But. You know, we take a lot of pride in, in measuring the value of our programs and even how much time we're investing down to how many hours it takes for one of my employees to put the program together to execute on it, to the amount of hours an employee is spending in it and understanding what they're getting out of it.

Through really well constructed survey questions and demonstrated behavior change, and I think that. That shows the employee that we're invested in them, and they're just more likely to stay if you give them those options.

**Rob Shannon:** Yeah, that's definitely been my experience as well, and so I appreciate you sharing that.

It sort of dovetails into what I would imagine would be the kinds of measurable outcomes, you sort of touched on that, that last response that the board or key stakeholders would want to be seeing or hearing about, I'm assuming when you report periodically. To them. And so I was wondering, you know, how at the moment you're showing the value of learning and development in terms of the investments that Teladoc is making to the key stakeholders.

**Carrie Berg:** We have a variety of methods. I think for most people watching if they're familiar with the Kirkpatrick model, that's a very common way to kind of measure the value of your learning programs from, who logged in and who viewed it and completed it, you know, all the way up to showing a return on investment and showing return on investment in training programs is difficult.

And it, and it takes a lot of actual time and effort not so much dollar spend, but time and effort to figure out how do you truly calculate a return on investment for a training program? For me, what is most critical to understand is does the employee know something new? Did they learn something they didn't understand before?

And did we change a behavior? And so a lot of our measurements are around, I learned something new in this program that I didn't know before. And a lot of times what we hear is and that's just a verbatim feedback question. A lot of times what we hear is I'm reminded of things that I need to be doing, which to me is also a learning opportunity.

They, they brought it back. It was in there and we just had to kind of dust it off and bring that action forward. And then changing a behavior like this changes how I approach my employee. I now know a new and better way to hold a meeting. I now know a new and better way to give feedback. So those I think are all important, you know, qualitative measurements to training.

The quantitative side really does come down to our spent How many hours of time is an employee spending in the program out of their hours of work a year? And we would love to see employees spend 40 hours a full year in some type of development program. Very hard to kind of get the systems in place to track it to encourage it.

But I think that, what I'm hoping, what I'm starting to kind of build out is this idea of tracking that and what I'm hoping to eventually build is that we can even have greater and stronger retention metrics around the fact that we're better at tracking the hours and are they staying with the company and are they being promoted and are they continuing to grow just by simply understanding the amount of time that they're investing in training.

There's a lot of other really easy metrics that I mentioned that are that level one or level two, that how many people log into your LMS, how many people have completed the self paced module that was made available to everybody, you know, how, how many people you know, participate in a click on various parts of your SharePoint pages and come to different live sessions or other sessions. Our business resource groups are also really critical part of our DE& I efforts, but also our learning efforts. And so we often take a look at who's participating in our BRGs and our BRG meetings and what kind of overlap is there between our learning programs and can draw good metrics from that, that again, connect engagement to retention to, you know, promotions to skills to even demonstrating some of our leadership attributes. All of that, we're able to kind of connect the dots on. I will say it's a little bit manual right now. I would love it to be all in a system where you could just click a button and it creates a dashboard.

But we have the ability to take a look at those numbers and take away some good understanding. And I think those are, those are probably a little bit different metrics than most

people think of, but they're, they're important to me to be able to say like, we're doing good work here and we're engaging our employees at a variety of levels.

**Rob Shannon:** Yeah, I could definitely see how that would absolutely foster increased [00:13:00] engagement throughout the organization. I'm curious, and you and I haven't really talked much about this, but, you know, as you're describing the environment there, curriculum design and sort of content development came to mind, and I'm wondering how much of the content that's comprising the training programs is being created from the employees, meaning that they're reaching out, they're wanting to learn about new different things versus how much of it is aligned with the corporate agenda or the management agenda for Teladoc? Are you able to talk a little bit about that?

**Carrie Berg:** Sure. I mean, I think a majority of our content is directly related to the organization or it's directly related to our leadership development programs, our professional development programs.

We do have a lot of other content, self paced content that we've pulled in from a variety of places. And most of the times those are leveraged resources that we, you know, have for free. Like I said, we use Microsoft. Microsoft has a plethora of free resources, especially right now with AI you know, how do I use AI?

How can I use Bing? How can I use Copilot? You know, things like that. We're able to kind of curate those resources together. We have a lot of, you know, articles and links to podcasts and, you know, things like that, where The whole of my team was really to find those resources and curate in a way that it makes sense and is intriguing and interesting for an employee to kind of click on and in view.

But I would say a good 75 percent of our content is really about our organization. I think I honestly want every employee to understand the business that that we're in and what we're trying to do and how we're trying to change healthcare and we're trying to take care of of our members. And we have a lot of, you know, products and a lot of ways that we care for people.

And I really want them to understand that. I also want them to be able to build out skills that are super relevant to their career. You know, even when they're not involved in health care, like finance and legal and, you know, some of these other departments, they don't necessarily engage with a member, but they're critical to our business and our business function.

And we want to make sure we have the right content for them, too. And we largely bring in, you know, free resources if we can. And we'll curate certainly specific content that's that's specific to like, what is healthcare and what is healthcare like in the United States? What is healthcare like outside of the United States and health equity and a variety of topics.

**Rob Shannon:** What spurred my question is it just so happens this week, I'm at an event and there was a lot of conversation and I know we'll get to this in a few minutes about AI obviously, everybody wants to talk about that. But in particular, the subjects that were being discussed this week were about sentiment analysis, both employee sentiment and then as relates to customers in this particular concept.

And a lot of the conversation was talking about extracting insights from employee whether it be surveys and so on. And so I was just curious about how much we're learning or you are learning from the employees in terms of what they want beyond maybe just what obviously the organization wants them to learn.

There's clearly a lot of applications for AI when it, when it comes to that in L&D and as I said, we'll talk about that in a few minutes, but I wanted to circle back to the employee engagement piece and, and just maybe finish that, this segment of the interview with any tangible outcomes or wins or success stories that you feel the audience today might be able to benchmark.

So some things that you found at Teladoc that you would consider wins. And I'm sure the group out there that's watching at the moment, you know, might be interested to hear about those and compare them to some of the things they're finding within their companies.

**Carrie Berg:** Absolutely. I mean, I think number one, any program that you put out as a learning and development organization is a form of engagement.

It's, it's a form of getting people together to learn for the most part, even if they're doing it self paced. There are other people viewing that liking the content, maybe sharing it. And I think, you know, creating a culture where people want to share what they've learned is super important. We use Teams.

We have a team's channel where people can post all sorts of different things. And that's one way to get engagement. But I think, any learning program is an engagement program. It's getting employees involved. You need to demonstrate how many people have participated and be clear about what they got got out of it when it comes to things like the employee engagement survey or even other feedback that comes in that you might be seeing when there's meetings going on and you're like, Oh, I really somebody says a comment around.

I'd really like to be trained to this. I'd really like to be trained to that. That's all important feedback for you to know and understand and take note of so that you can go back and respond to that or offer it up at a time later on, because it shows that you're listening, [00:18:00] you're understanding where your employees are at, and you may not be able to create a whole program.

You may not be able to create like some eight week adventure for somebody, but if you can find a really good article that speaks to it or a podcast or anything else, That you can share. It shows that you're invested in them. You heard what they were saying, and we're giving them something and giving them something to engage with part of the pun.

So you know, I think in L&D, we have to remember that we're doing more than just training or connecting employees were engaging them. We're trying to help them grow their career. We're trying to help them be better people and better managers or better leaders. You know, cause I believe everybody's a leader regardless of their title.

So, you know, creating programs with that kind of vision in mind, you know, it makes it easier for the, the low hanging fruit can really move the needle for you. And we got to get away from thinking we have to produce these grandiose programs to make things happen. It's very easy in a very low lift to deliver effective content that means something to an employee.

**Rob Shannon:** And that's a great segue to sort of how people learn. You know, I, for one, I'm a visual learner, for example. But I know you've done a lot of work in this area and you've given a lot of thought to the learning community at Teladoc. And so I was wondering if you might be able to share some insights from the work that you're doing in that respect.

**Carrie Berg:** Sure. So I think we have to... I always say that people like training the way that they like to receive it. So then they want you to deliver the training in the same way. So, you know, if, if a senior leader in the company is like, well, I want to be in person in a building for two days, they expect you to deliver all programs in that same way.

And that's not scalable and it doesn't solve the needs for everybody. And it's also resources. So I think you have to be able to provide programs that solve for those [00:20:00] visual learners. I'm one of those. I'm also a processor, so I have to kind of watch it. And then I need a moment to think about it and think about how I apply it.

We have those people that are listeners. They can just listen to a podcast and take it all in and know exactly what you're talking about and can bring it to life. You know, I think offering different ways for people to learn. And I will say that in my experience when you get a lot of different cross functional groups together where they can talk and practice and share.

You find that a lot of times, especially in leadership training, we're all dealing with the same stuff. We all have to give hard feedback to somebody. We may all have to kind of fire somebody. We may have to give somebody more direction than we really want to. You know, there's all of these things. And once you start talking to other people who are in that same boat and they struggle, you're like, Oh, my gosh, I'm not alone.

And suddenly the learning has changed to being about talking with other people and learning from each other and getting best practices and even like what not to do in certain situations, which is also critical learning. So I think it's all about providing those different types, making them easy to find.

That's something I think that we've done a good job of, but I'd love to see us get better, which is like in our LMS, how do we tag content to make it easier to find so people can search for it easier? And, you know, some of our tools, their search function doesn't have an AI component. So you go in there and it's not great at finding what you think you type in the word leadership, and it gives you a whole bunch of other stuff that doesn't have the word leadership in it for some reason.

So, you know, sometimes it's also about, like, getting your tools set up for success so that it's easy for people and employees to find it, look at it, and use it. That one of those little things. That's the balance of getting the right technology and driving the right behavior of the employee to self serve and to do those searches.

**Rob Shannon:** Yeah, so much of what you just talked about sort of is the last segment of what I'm hoping we can speak about. That's really the artificial intelligence arms race when it comes to tools and the opportunity for people like yourself to deploy really exciting and innovative technologies. And I know you're using AI quite a bit in your day to day in some manner.

Can you expand on what that looks like in the Teladoc environment?

**Carrie Berg:** Yes. I mean, I think we are using AI to help us create, you know, program outlines and help us answer questions, you know for example, I even this morning I was creating a quick slide deck on, you know, how to create a strong center of excellence.

And I went right into yeah, GPT. And I say, what are some things that you need to create a center of excellence? And so I think that using AI is critical for us in L&D. I also find it [00:23:00] interesting that, that there's, there's vendors that want to charge to use it and it's free. There's a gajillion AI websites that are free.

So one of my favorites are chat GPT, pop AI, perplexity, all of these things where they will even create slide decks for you if you want to for free to a point, right. But, you know, I think that the team is using AI to, again, help them create content, help them create outlines. It's even great to say what kind of metrics would be most valuable for a group of 20 managers with 5 to 10 years of experience after they leave the leadership program.

Right? So, and that lends me kind of to my 2nd point that. You can use AI in everything, but you have to understand how to ask it the right prompts. And I think we're in this interesting space,

like Google's been out forever, but when Google first came out, people didn't know exactly how to Google what they needed.

They would ask it kind of weird questions and not get the answer that they want. We are [00:24:00] now in that same space again with AI. If you want a good result from AI, you have to be able to ask it a good question and ask, have robust prompts. So I think that that's something that I'm still learning, that my team is still learning, and that I think we want to teach our employees how to do a better job so they can help find some things for themselves.

But I think It's so helpful in anything and everything that you're doing. It is a form of Google in my mind. It's just smarter, better and gives you some better contextual responses back and things that you can use and leverage to move the needle. Whether you're creating a curriculum or trying to define design survey questions or even have a design, you know, powerful objectives for you to use in a curriculum.

Or whatever you can even create graphics, which is really great. Although I will say you know, I think my team does a better job right now, creating graphics in some ways that AI, I think that's one of those things where going back to my prompt question you know, you got to ask it, you have to prompt it to the right way in order to get the graphic that you want.

Yeah. But, you know, I think that the world's our oyster with AI don't think we should be intimidated by it. It's not going to replace anybody's jobs. It's going to make our jobs a lot easier and it's going to enhance what we're doing. And I think we all need to develop better skills on how to leverage it.

**Rob Shannon:** I couldn't agree more personally. And there's so much debate on that particular topic. You touched on a few things there that we could spend another half hour or more talking about the prompt engineering curriculum development and how to kind of sort of streamline content creation. One of the things, though, that is really interesting that we've been learning a lot about hearing a lot about our research is upscaling and reskilling the workforce for AI.

And it sounds like organically you're doing a great job of that by encouraging people to use it. [00:26:00] So, well done. Which is what brings me to our last question. We're running out of time, unfortunately, and it's around vendors. You talked about solutions. I mentioned there's an arms race out there and no doubt there are probably more than a handful of solution providers listening into this conversation that trying to extract insights about the buyer's mindset and how can they craft a solution that has a chance of winning in a very competitive market.

And so before we break, I was hoping you might just be able to spend a minute or two talking about how you tackle that issue. And if you were giving advice to solution providers that are

out there right now in terms of getting on a short list to be potentially selected, what kinds of things would you share about your purchasing decision framework to Teladoc?

**Carrie Berg:** So I think versus I'm not going to pay extra for any AI feature unless it's really different than me just looking it up on the side. So, I think that's number one is like a lot of vendors are wanting to upcharge for the use of AI within the tool and I don't see a value with it at all. If I can go up to another screen and quickly look for it on chat GPT, and then just kind of cut and paste it to the tool that I'm using. I think ROI is a must.

So if somebody is coming in and they have some great tech advancements and advancements include, you know, AI or language learning model model or something like that, I need to understand that if I pay extra for that, what is going to be my ROI. And it's got to be clearly articulated and something I can feel and see in six months or less.

Sometimes they say, Oh, I'll take like at least a year. No, I can't do that. The learning space is so competitive. There is a million vendors out there. And there's also millions of ways that we can find what we need for a lot cheaper. So, the pitch has got to be strong. The value has got to be clear. The return on investments I spend a little bit extra because I think this is rock star material has got to be seen and felt in a much shorter period of time.

And ultimately, I need something that can support all people on my team, not just a couple of content creators or anything like that. I need, I need something that can help my management team my team that supports different audiences and different groups and can help me with like the global level too.

Can you translate and can it translate well? So those are just a couple of things I know we're, we're running out of time, but that's probably a quick list.

**Rob Shannon:** That's a really important list. And I'm sure there's a lot of people out there right now furiously taking notes to try to crawl inside the mind of a potential purchaser.

So thank you for sharing that. You're right. We are actually coming up on time. And so I want to thank you, Carrie, for all of the great insights that you shared with our community today. And say, I'm really looking forward to meeting you in-person at the People Analytics Exchange later this month which is going to be a fantastic event where we'll hear a lot more about all these subjects and a lot more detail.

So thank you again. And for those of you that are participating, don't forget to go ahead and apply for your Sherm credits. Thanks, Carrie.

**Carrie Berg:** Thank you so much.

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