Ingersoll Rand Scales Video to Drive Learning, Culture, and Strategy

Overview

Ingersoll Rand is a diversified industrial company that advances quality of life by creating comfortable, sustainable, and efficient environments. Its family of brands, including Club Car®, Ingersoll Rand®, Thermo King®, and Trane®, enhance the quality and comfort of air in homes and buildings; transport and protect food and perishables; and increase industrial productivity and efficiency.

The company has hundreds of locations worldwide and serves customers in highly competitive industries and product and service categories. Consequently, the company consistently looks for new learning solutions across the breadth of the organization. Today, Ingersoll Rand is leveraging a new kind of video solution—one that enables the company to build employee skills and capabilities.

In This Case Study

- How Ingersoll Rand implemented a new video tool to facilitate learning and development
- Examples of the simplicity, real-time tracking, and analysis the video tool offers
- Next steps as the company expands its use of video learning globally to support formal and informal learning and development
Company Overview

Among the company’s industrial offerings are Ingersoll Rand air compressors and power tools, ARO electronic interface pumps, and the ubiquitous Club Car vehicles seen at golf courses and industrial facilities around the world. Ingersoll Rand’s climate businesses include Trane commercial and residential heating, ventilation, and air conditioning (HVAC) systems and services, as well as Thermo King transport temperature-control equipment—among other respected brands.

The company’s more than 46,000 employees work around the globe in hundreds of facilities, including offices, assembly plants, technology centers, warehouses, and distribution and repair centers.
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Business Environment and Challenges

As a global company with competitive offerings across its entire product spectrum, Ingersoll Rand competes against not only highly regarded global brands but also established regional and local suppliers. A dispersed and multilingual workforce, a multitude of work environments, and the diversified manufacturing of different product lines present training opportunities for the company.

To meet the needs of the employees, the company established a strategy of “creating a winning culture” as a core component of how it delivers premier performance. Ingersoll Rand defines a winning culture as one in which “the best people aspire to work, a place where employees feel connected with the company’s vision and empowered to do the right thing.”

To build upon a strong, winning culture, Ingersoll Rand utilizes Panopto, an enterprise video platform. The platform serves as an important tool used in learning and development to rapidly share knowledge and information across the organization.

HR Environment

The HR team at Ingersoll Rand is led by a senior vice president of human resources, communications, and corporate affairs (CHRO), who reports directly to the company’s chairman and CEO. The vice president of talent and organizational capability reports to the CHRO for talent acquisition, leadership development, talent management, organizational effectiveness, strategic capability building, diversity and inclusion, learning, and career management at all levels.

The talent and organizational capability team is responsible for Ingersoll Rand University. The team functions as a de facto center of excellence for
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a range of learning solutions and disseminating knowledge effectively, rapidly, and broadly.

Ingersoll Rand Employs the Power of Video

Ingersoll Rand selected video as a tool for learning, development, training, and engaging employees in a winning culture across the globe. With Panopto, Ingersoll Rand was able to offer self-produced, internal video creation as an option to complement the video work done by external video production companies.

For decades, the company had used video to record high-profile corporate events and training activities. These productions often involved expensive recording equipment, producers, editors, and outside vendors. The high costs and specialized expertise required made it difficult to utilize video at scale across an organization as large as Ingersoll Rand. Further complicating matters, budget and quality could extend the production time for recorded events and training classes by weeks or months, making video a less-than-ideal support tool for rapid communication and knowledge sharing.

However, as anyone who has watched viral videos online can attest, video’s power as a medium for spreading ideas is significant. The learning teams at Ingersoll Rand wanted to find a better way to leverage this power internally.

Ingersoll Rand’s leadership development team sought a video solution that could be used by professionals and nonexperts alike—one that would make video easy to capture, edit, and share; simplify the legal review process for videos; and accelerate the company’s ability to deliver key messages across the organization via online training. On the production side, the company would need to be able to insert presentation slides, additional videos, or other information into video recordings as well as to delete extraneous material from recorded events. Team members would need to be able to record video on any device (from personal smartphones to professional video cameras), automatically synchronize video feeds with presentation slides and live screen recordings, and create transcripts. The solution would also need to enable learning teams to download existing recordings for use in regional town hall or training settings all around the globe.

Ingersoll Rand also wanted to improve the viewers’ experience with intelligent and efficient navigation of the content inside long videos. The company sought a solution that would include both in-video navigation options such as a table of contents and slide thumbnails as well as a comprehensive video content search. With the right support for video search, viewers would be able locate keywords or phrases spoken by presenters or shown on-screen and then instantly jump to specific, relevant moments in the video just as they could within a text-based document.

After researching the enterprise video market, Ingersoll Rand ultimately decided that the Panopto enterprise video platform best met the set of

**KEY POINT:** For video to enable performance in the flow of work at Ingersoll Rand, employees needed to be able to comprehensively search videos for key words and phrases.
needs the company had identified. In 2015, Ingersoll Rand engaged with Panopto, choosing to deploy it in the cloud to streamline implementation and ensure maximum stability and reliability. The company then made plans to use that year’s internal annual leadership conference as a pilot test for Panopto.

**Communicating Leadership Development Strategy and Culture**

The pilot test proved to be a success. During the company’s leadership conference, the company used Panopto to record the event. Within three days, company leaders were able to use the postevent video to continue cascading those messages across the organization.

*So much information is shared in our annual leadership conference. Many employees do make time to watch our CEO’s presentation, but there is so much more between the opening and closing messages that people often miss, and we needed to give them better access to it.*

—Learning Technology Manager, Ingersoll Rand

A prominent search field in the video allowed users to locate terms contained within transcripts or speaker notes and provided active links to content (see Figure 2).

**Figure 2: Search Field for Terms in Videos**

![Search Field for Terms in Videos](source)

Feedback about the leadership conference video from across the company was excellent, which encouraged Ingersoll Rand’s learning technology team to more broadly roll out Panopto.
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Shortly thereafter, the learning technology team began experimenting with repackaging other video recordings into more novel communication products. For example, Meeting in a Box provides employees with the main takeaways from a meeting, which they can then use to direct their learning.

Promoting Operational Excellence

HR business partners began to inquire about using the video solution to help plant managers improve efficiency and share best practices. At Ingersoll Rand, plant managers are always seeking new ways to improve their lean manufacturing efficiency and operational excellence practices on the factory floor. Every new efficiency leads to cost-savings that directly impact the company’s bottom line.

Prior to using Panopto, if a team member wanted to document a process or an opportunity in a video, they would have needed to bring in equipment and a videographer.

Today, achieving operational excellence is easy. Team members participating in the Panopto program can simply record the process with any smartphone. Learning managers on the ground can quickly edit the video to add supplemental information such as a screen recording or presentation slides, and share the video almost instantly. Managers and other stakeholders can now watch a video from their desk, while traveling, or at home.
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Not only does the video platform help us fix problems, but it also helps train employees on the resulting new processes. Now they can come in, watch a video, and know exactly what to do—it’s quick.

—Senior Learning Manager, Ingersoll Rand

Figure 3: Recording and Editing High-Quality Content


KEY POINT: Today, employees can capture and observe production problems and opportunities in videos that other workers can watch away from the production floor, thereby accelerating the time to increased productivity and decreased risk.

KEY POINT: Trainers can watch past sessions on-demand, and the search function in the video platform allows them to move quickly through the three-day program to topics they need clarification on or have questions about.

Accelerating Learning Delivery

Ingersoll Rand’s talent and organizational capability team also uses the new video platform to improve delivery of learning content including how the team trains its own trainers.

Ingersoll Rand offers sales excellence training led by in-house trainers and taught at locations around the world. Originally, the train-the-trainer model for the program was simply to have new trainers physically attend an upcoming session.

Today those sessions are recorded with Panopto, which enables new trainers to go back at any time and watch as many previous sessions as they need to feel confident leading the session. They can even use the search function, which allows them to move quickly throughout the recorded training sessions to areas that answer specific questions they have while skipping the sections they are already familiar with.
Capturing Institutional Knowledge
As the baby boomer generation retires, early talent is hired and knowledge transfer is essential.

We need to document certain processes and best practices to ensure transfer of learning and avoiding rework and relearning.

—Chief Learning Officer, Ingersoll Rand

HR business partners have begun recording employees' insights before they retire. By preserving their institutional expertise in a searchable video library, their years of know-how can continue to benefit the entire organization even after they're gone.

We are creating a record of how things are supposed to work that otherwise would be lost.

—Chief Learning Officer, Ingersoll Rand

Analyzing Success
Another advantage the video platform has provided the learning technology team is the ability to analyze usage data in order to fine-tune future learning materials. Panopto’s reporting features go far beyond cataloging unique visitors. For example, the analytics suite identifies specific parts of videos that are most frequently viewed and bookmarked. With this knowledge, the learning technology team can edit and improve existing training content to better engage viewers as well as tailor future training toward areas they identify to be of special interest.

The learning technology team also uses data analytics embedded within the platform to measure how quickly new messages are viewed. Figure 4 displays a video message that was slow to build, with just a dozen views initially. Within a week’s time, that number spiked to more than 400 views, with more than 12,000 video-minutes delivered.

We still have the new trainers participate in the program to learn the content—only now, they can even go back and review the training sessions the very next day. And doing so takes only about an hour of prep time to get everyone up to speed on our recording techniques.

—Learning Manager, Ingersoll Rand
In the example shown in Figure 5, the learning team was able to use video analytics to quickly identify when viewer engagement began to decline. The team then used that knowledge to improve both existing and future content.

*We have learned to expect a “falloff curve,” which drives the need to continually communicate and refine our content. We can apply our insights from the data to identify key segments, then use the built-in video editor to isolate and produce more concise messages.*

—Learning Technology Manager, Ingersoll Rand
Distributing Video Tools Globally

Having deployed Panopto in the cloud, Ingersoll Rand was able to roll it out rapidly on a global scale. The software-based video platform is flexible, enabling multiple users to record and upload content simultaneously, even while other users are recording. For Ingersoll Rand’s video content producers, storing videos in the cloud saves hours they used to spend transferring large video files from memory cards. Not only that, but all the video content is automatically indexed for search and time-stamped by default, saving producers the effort of manually tagging videos to help with discovery.

*We have seen hours, days, and weeks of time savings with the Panopto video cloud compared with how we used to support video.*

—Learning Technology Manager, Ingersoll Rand

Video has become a companywide resource for capturing best practices, sharing learning materials, developing trainers, preserving knowledge, and rapidly improving operational processes. New Panopto videos are being created every day in Ingersoll Rand’s learning management system, employee and email communications, and classroom distribution.

*We added 33,000 video views this last year. People want to be able to go into a video and find exactly what they need to solve their problem, and then they move on. Our video platform has*
At first, the learning technology team members considered opening up the platform for any interested employee to use. In order to ensure that employees had a great initial experience, though, interested participants in the Panopto program were encouraged to identify compelling use cases for video and align the use of the tool with purpose, to create highly effective video, audio, slide, and screen recordings. The learning technology team has begun one-on-one and small-group training sessions for learning managers, communications business partners, subject matter experts, change agents, and any employee who wants to build their digital skills and abilities as a simplified video editor to produce a unique, video-based storytelling solution. Training includes best practice sharing on how to improve the production value. The learning technology is available for on-call questions and answers to ensure that the system works well in production projects around the world.

_We rolled out Panopto in 2015, and today we have more than 200 qualified users. Next year [2019] we plan to spread the tool even more widely across the company._

—Learning Technology Manager, Ingersoll Rand

**Business Impact**

When Ingersoll Rand piloted its new video platform, it sought to find a complement to professionally produced videos for internal use. What it realized it had found was a flexible tool that could also help the company rapidly share its culture, strategy, and goals for the coming year beyond what a live event could reach. Executives felt that the impact from the video pilot was tangible, and the company’s HR team began expanding the use of its video platform.

Today, video viewership is rapidly increasing at Ingersoll Rand, and that has led to several benefits, including:

- Improved operational processes and procedures
- Efficient and widespread knowledge sharing
- Rapid and cost-effective development of corporate trainers
- Promotion of a shared culture

_Panopto has had two positive impacts that are difficult to quantify but nonetheless essential. The first is that we are accelerating the digital transformation taking place at Ingersoll Rand. In the future, our corporate classrooms and other business learning environments are going to depend on video._
Lesson Learned

- **Seek opportunities to innovate with technology.** While Panopto was originally deployed as a way to improve the video experience for corporate events, learning leaders quickly saw other opportunities and were encouraged to investigate them.

- **Preserve and share institutional knowledge.** As baby boomers retire and companies seek to fill jobs with younger applicants, video is an excellent way to quickly create a record of institutional knowledge. Ingersoll Rand is beginning to record employees sharing their skills and knowledge before they depart.

- **Leverage the power of video content search.** While corporations have used video for training purposes for years, employees previously couldn’t search recordings for relevant content. By enabling people to search for specific phrases, Panopto has allowed employees to quickly find the information they are looking for and get back to the task at hand.

- **Onboard new users to increase their odds of success.** Showing each “producer” how to leverage the tool in a one-on-one coaching session increased confidence and satisfaction with using the solution—and created internal advocates who can now recommended the tool to others.

Next Steps

While the number of users for Ingersoll Rand’s video platform has expanded from just a few in 2015 to more than 200 in 2018, the company plans to grow its user base exponentially in 2019. At press time, most of the users are part of the wider HR organization, including corporate communications, learning and development, and HR business partners. However, as the tool is used more extensively throughout business units, demand for it continues to increase.

Looking to the future, one challenge for the learning technology team will be supporting a wider user base. So far, the key to the team’s success has been offering hands-on support and training. Rolling out the video platform more broadly means this team will need to scale its own training through both a proven train-the-trainer methodology and searchable on-demand video training materials.
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If video storytelling or knowledge transfer is a skill and a capability, then we are going to need to make training fun and easy to access.

—Learning Technology Manager, Ingersoll Rand

Conclusion

Global organizations like Ingersoll Rand need the ability to spread information as fast as possible. And with operations that span time zones, continents, business units, and regional identities, they face even tougher challenges when it comes to spreading culture and knowledge.

Video is an obvious solution, but not all videos require production by teams of specialized experts. Leveraging technology that simplifies video content creation, production, and distribution can be a cost-effective and fast way to share information in a distributed organization.

To truly leverage the power of video and its ability to spread knowledge, companies must make video content accessible to their team members on any device, at any location, at any time of day. Companies can achieve maximum effectiveness by creating videos that are searchable and linked to other key information, including presentation slides. Implementing these capabilities can help organizations effectively utilize video as a true learning resource.
Endnotes

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- **Content and Insights**—Market-leading, proprietary research including research reports, high-impact industry studies, videos, webcast replays, process models and frameworks, and case studies.

- **Bersin Blueprints**—Designed to provide actionable approaches to help Human Capital leaders address their most pressing talent challenges, Blueprints offer convenient access to research, performance support materials, tools, and member advisory services to tackle key challenges.

- **Interactive Factbooks**—Covering a wide spectrum of Human Capital metrics, this platform allows members to filter by industry and company size and create custom benchmarks, analyze trends, and identify drivers of variance.

- **Maturity Diagnostics**—Research-based maturity assessments, integrated with business feedback, deliver actionable custom analysis, relevant research resources, and guidance from member advisors. These assessments help members develop a plan to progress in maturity.

- **Performance Support**—Practical materials in the form of illustrations, handouts, worksheets, templates, assessments, and recipes. Members can use these materials to help promote thinking, facilitate discussion, enable self-assessment, outline steps, direct processes, and aid decision-making.

- **Member Advisors**—Through virtual and in-person activities, our specialized member advisors help members understand our research, uncover deeper insights, prioritize human capital issues, and map solutions to some of their most pressing challenges.

- **Networking**—Member-only online Communities, working groups, and roundtables let you connect with peers and industry leaders to discuss and learn about the latest industry trends, emerging issues, and leading practices.

- **IMPACT Conference**—Our executive conference brings research-driven insights to Human Capital leaders and their teams, offering them the opportunity to exchange ideas with other senior-level practitioners, industry thought leaders, and Bersin team members.

For more information about our membership program, please visit us at www.bersin.com/membership.
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