Seven Critical Questions

for Evaluating Your
Learning Strategy
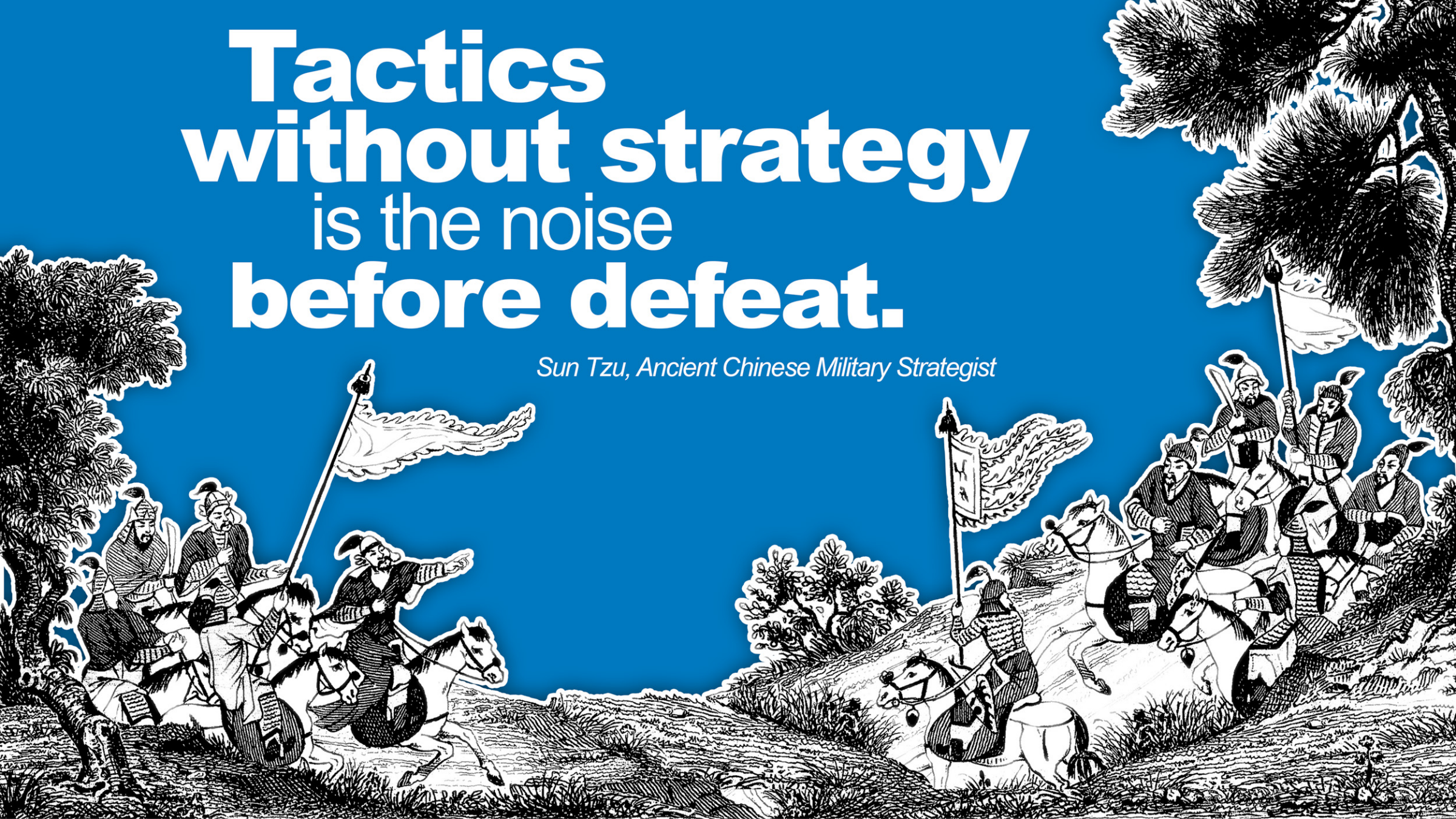
How to Plan a Successful Learning
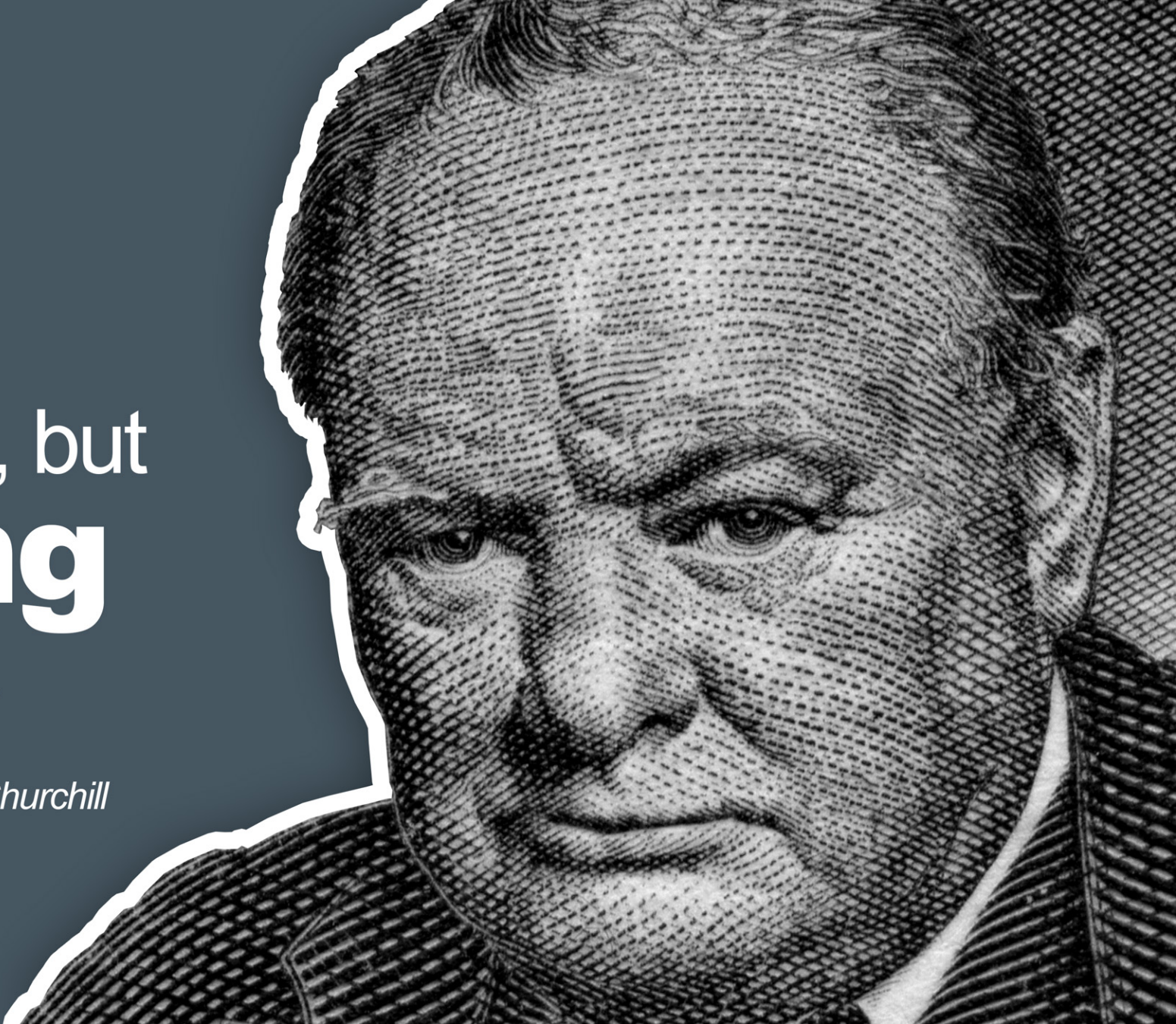Organization from the Ground Up

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Tactics without strategy is the noise before defeat.

Sun Tzu, Ancient Chinese Military Strategist

Plans
are of little importance, but
planning
is essential.

Winston Churchill

Shiny New eLearning Tools or Strategy?

If you're reading this, it's probably because you want to assess your current learning environment and make some changes for the better. Congratulations! You're taking the first steps to really grow your people and your business.

If you haven't thought about your strategy yet, don't worry: You're not alone. Almost 80% of organizations are not creating learning strategies that take into account the constant changes in technology, according to a 2016 study by Brandon Hall group.

That said, a full
86% of best-in-class L&D teams
do take the time to understand what their employees need and how they learn.

As we'll see, those things (and others) are the cornerstones of a good corporate learning strategy.

After more than a decade working with clients, we suspect that a lack of focus on learning strategy comes because learning professionals focus too narrowly on the tools of learning. Knowing the tools is important—but you can't select the right tools without knowing the right approach, and you can't take the right approach without knowing your strategy.

Get a handle on your strategy and it will be easier to determine what tools to acquire, which features you'll need and which partners can deliver those tools and features.

Why is HSI Helping with Learning Strategy?

Short answer:

We'll do whatever it takes to help our clients be successful when it comes to eLearning and corporate training.

Whatever it takes!

Long answer:

We've been providing training, strategies and tips based on research, business trends, and best practices for a long time.

We've also learned a lot from our clients along the way.

Seven Basic Questions

We've discovered that there are **seven basic questions** any organization needs to ask when developing a corporate learning strategy:

1 *What kind of learning culture do you have?*

2 *Who is your audience?*

3 *What are your core competencies?*

4 *Do you have learning paths based on the competencies?*

5 *What do you need today? What might you need tomorrow?*

6 *Have you reviewed your metrics? What do they say?*

7 *What criteria are you using to evaluate content providers?*

1

What kind of learning culture do you have?

Companies with a well-defined learning culture tend to do better than those that don't have a well-defined learning culture.

Yet only 1 in 10 companies have a positive learning culture in place.

Those with a strong learning culture tend to:

- Attract top talent.
- Create self-sufficient workers.
- Develop healthy internal competition.
- Create a pool of qualified candidates ready for promotion.
- Adapt to change more quickly.
- Foster innovation.
- Increase employee engagement and therefore reduce turnover costs.
- Have a larger ROI on training and development.
- Be filled with individuals who take ownership of their own career paths.

(For more on the benefits of a learning culture, both direct and indirect, see our whitepaper "10 Benefits of a True Learning Culture.")

Different Kinds of Learning Cultures

Not all organizations are the same.

Since not all organizations are the same, we expect there to be different kinds of learning cultures, too. We've found that organizations tend to vary along two axes, one that measures who in the organization drives learning, and another that looks at how wide the content topics reach. This gives us four distinct types of learning cultures found "in the wild":

● **Traditional**   ● **Immersive**

● **Pioneering**   ● **Free-Form**

For more details on these learning cultures and how to adapt training to each, see our whitepaper "4 Most Common Types of Learning Culture."
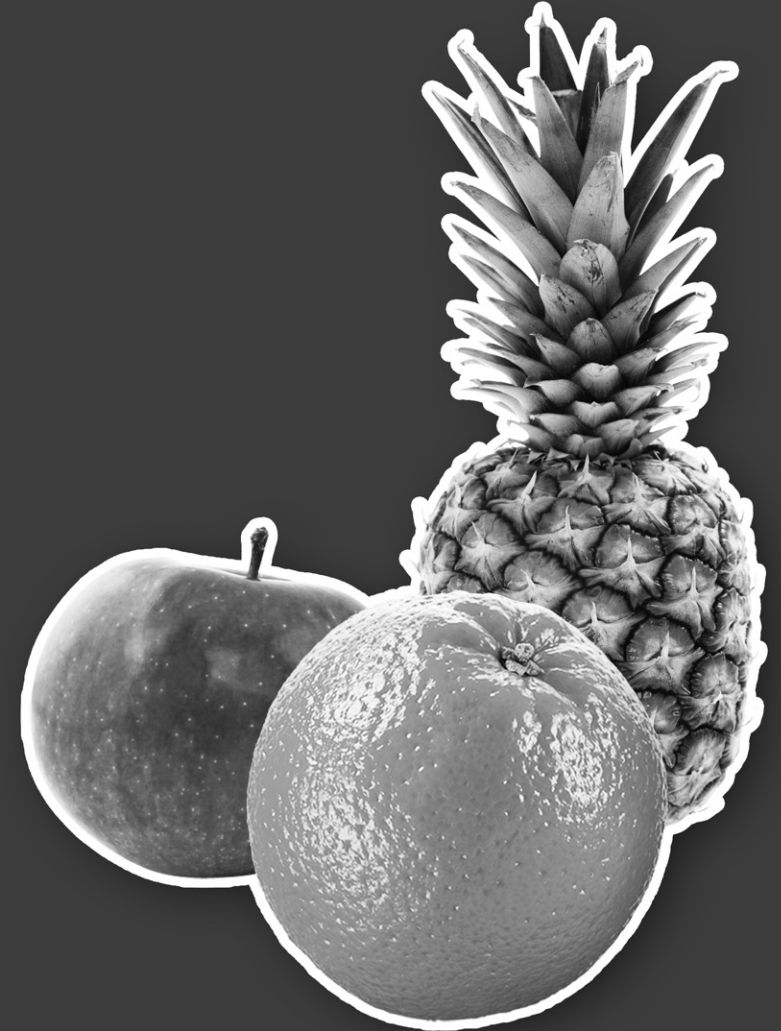
Traditional

A **Traditional** learning culture favors more tried-and-true learning methods, such as lectures and shadowing, where management can quickly get employees up to speed for their roles.

Immersive

An **Immersive** learning culture creates a "total experience" for learners, where they are exposed to everything from the company's history to life skills and more.

Pioneering

A **Pioneering** learning culture gives employees the freedom to develop the skills they need, often on the fly.

Free-Form

A **Free-Form** learning culture gives employees even more freedom to learn and to teach on an ongoing basis -- indeed, it is expected as part of their "work-life balance."

Evaluating Your Learning Strategy

Find the right fit.

When evaluating your learning strategy, it's important to find the right fit between your learning culture and your people, processes, and technologies. For example, Pioneering cultures will thrive if self-motivated employees have open access to a library of content plus social learning tools. By contrast, an Immersive culture might want to start by looking at branded content and advanced tracking tools.

2

Who is your audience?

When most learning and development professionals think "audience," they think learners, but there are actually three audiences you need to be thinking about:

**Your key stakeholders
Your administrators
Your learners**

Your key stakeholders

Most likely, these are your executive sponsors. They are the ones that have set your timeline and budget, so you need to ask: What do they expect to get out of the learning initiative? Try to understand what they're looking for.

If possible, interview them. Some good questions to ask:

- What outcomes are you looking for? How will they be measured? (What are the KPIs?)

- Are there specific problems we are trying to solve?

- What should we be looking for in learning partners?

- What's the timeline?

- What's the budget?

- Is there specific content or features we need?

Your administrators

Administrators are essential to the success of your learning program. You may already have some learning administrators, so sit down and ask them some of the same questions you ask your stakeholders.

Questions to ask:

- What don't you like about the current way learning is handled in the organization?

- What do you like or dislike about the current partner(s)?

- Which parts of your job are easy, and which are difficult and cumbersome? Which could be streamlined?

- What questions did you get asked the most by users? By managers?

- Is there specific content that people liked? Or didn't like?

- What do you need the system to be able to do?
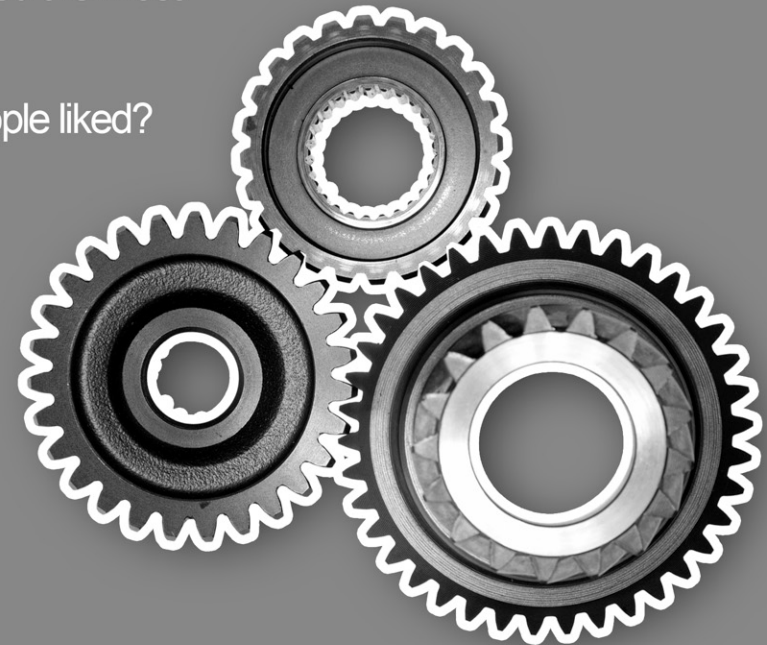
Your learners

Because the goal of employee training is to give employees the skills they need to be successful in their jobs, your audience should influence the type of training you provide.

Who will be on the receiving end of your training?

Assuming your employee population is varied, you probably have a mix of seasoned professionals and beginners crossing multiple generations. Within that group you probably have those that like traditional leader-led training and those that like online learning, and some that like a combination of both.

So dig in and talk with your employees. Survey the learners and ask what they want in a training program, what they need.

3

What are your core competencies?

Competencies are abilities, behaviors, knowledge, and skills that impact the success of employees and organizations. A competency is then broken down into specific tasks to help employees understand what the expectation is for the organization.

How about an example?

Suppose customer service is one of your competencies...

The definition for this competency could be something like this:

Displays a serious commitment to the highest level of service to all customers.

Aligns company goals with those of the internal and external customer by listening and responding to their needs and to changes in the industry.

Ensures quick resolution of problems, provides quality service and products, and maintains open communications to promote customer commitment and long-term retention.

That's a good definition of a customer service competency. But under that heading of customer service, you also need a list of specific tasks so employees know what that competency looks like back at their job.

The definition, in other words, is a constant: It is the same for every role in the organization and changes little over time. Specific tasks, however, will look different from role to role. How a salesperson embodies customer service will look different from the way a warehouse employee embodies it (for example).

Creating a Competency Model

Once you have your competencies defined, you can create a competency model. A competency model is a **set of 7 to 10 core competencies** that are aligned with your company's business goals. The competency model thus defines what an ideal employee looks like generally, and what excellence in a given role looks like.

Because business goals (and how they are achieved) differ from organization to organization, so will competency models.

4

Do you have learning paths based on the competencies?

Competencies are an excellent tool for developing a learning strategy because they act as a "blueprint" for the organization.

In fact, the *Top Companies for Leaders* joint report by *Fortune* and *Aon Hewitt* found that a full

100%
of companies

making the global top companies list use a well-defined competency model.

One way to see this is to imagine what happens when an employee is doing something, but it's not clear that it supports one of the competencies (or worse, interferes with them). For example, maybe your organization has a customer service competency, but the employee tends to alienate customers because he or she is focusing more on getting through the task queue efficiently. Or maybe you've chosen the delegation competency, but you a have a manager on your hands that still insists on doing everything solo. In these kinds of cases, you have to ask: *Why is this person working that way? What value does it really add? Or are they somehow detracting from the overall strategy?*

Now think about how this would reflect in your training.

The purpose of training your employees is to give them the tools they need to be successful at their jobs. While it would be great to train them on everything, learning professionals (and learners themselves) are constrained by time and budget. The competency model identifies the most important things on which to focus.
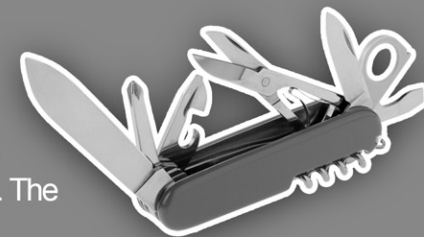
So, craft your training around your organization's competencies. To take the example from the last chapter, if customer service is a core competency across your organization, you should be training your employees in ways that improve their customer service skills. Find content that speaks to your competencies and create courses that can help both your leaders and your front-line employees grow in those areas.

You will also need to research how competencies can be measured and tracked. This will affect your selection of both assessment tools and an LMS. If your LMS can assign content based on competencies and track progress you'll find implementation of the competency model to be much more successful.

Unfortunately...

31% of organizations

have yet to define the essential leadership competencies required for their leaders to achieve their business goals, according to a 2016 study by the Brandon Hall Group.

And only 24%

are fully using any of the components of a competency-based talent management program.

5

What do you need today? And, what might you need tomorrow?

Employee training is exponentially more valuable when it is completed before it is actually needed. Consider a safety training video. These are useful things for employees to see.

But, what's better:

Seeing the video after an incident occurs, followed by a lawsuit?

Purchasing training content because you are forced to show it to your employees for remediation is focusing on today's needs. That's not a bad thing! But organizations do better when they can think ahead to what they will need for the future.

Or learning those important safety lessons to prevent incidents in the first place?

Look at every aspect of your business and try to determine not just what you need today, but what you will need three months or three years out.

Your competency model is a good place to start, of course, but you should look at your planning as well. For example, if you're looking to acquire new business by merger or acquisition, you're going to want a solution that can accommodate that type of fast growth. You're going to want a system that can store your historical training data from other systems. You need to determine how many users could need access to the system. And your learning partner needs to be able to grow and accommodate your changing business.

Taking the time to sit down and determine **short-term** and **long-term goals** will save you time and money in the long run.

6

Have you reviewed **your metrics?** (What do they say?)

Most organizations with a learning program will look at hours of training overall (and budget for training). That's important to have, but it's not going to give you a lot of actionable information.

You'll want to really drill down into your data if you want to form a **solid learning strategy.**

For example, take a look at high-potential employees. *How many training hours do they have? What programs are they viewing? How are their test scores on completed courses?* This information can help you duplicate their success, creating development plans for other up-and-comers.

Onboarding is another area where looking at the data can help. Poor job training results in

40% of employees leaving their job

within the first year. Imagine if you could beat that average through better training in onboarding. To do so, take a look and see what your newest employees are being trained on. Is that the right training for them? Are they completing the training? Is the right training being made available? Is it accessible and easy to find?

Don't limit yourself to new employees either. Look at those that have been with the company for some time. What do you, and your learning partner, need to be able to provide this group? What are your top 10 viewed training programs, outside of required courses (e.g., for compliance)?

Metrics will also help you identify the least-viewed content. Find out what this is and start investigating why those titles and topics are the least-viewed. For example:

- *Is the content not what your employees were expecting?*
- *Did the course title or the course description not align to the actual program?*
- *Is the course applicable, but the content needs to be replaced with something fresher and more up to date?*
- *Is there a lot of extra content that is duplicated and you shouldn't be paying for?*

A good LMS will track usage and give you these metrics. Diving deeper into the data can give you insights into what is being used, or not used, and why. This will help you **better match content to people and competencies.**

7

What criteria are you using to evaluate your current content provider?

In our experience, the practice that gets most learning organizations into trouble is focusing on just one criterion when evaluating content providers.
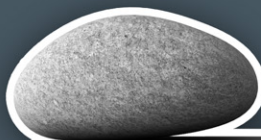
How about another example?

They might fixate on **price.**

They might fixate on **number of titles.**

Often it's a combination:
How many titles are they getting per dollar?

*This is a really bad metric to use because **it leads to lots of unused content and is a nightmare to organize and use effectively.***

There are
some questions
that you and your team
will need to balance against cost
to determine the actual value
of what you are getting.

Questions to Determine Value

Engagement:

- Are your employees likely to use the system?

- Will they retain the information they learn?

- Is it worthwhile to pay for quality content, rather than save on content that is ineffective, or never used?

Features:

- What features do you need?
  (For example, if a system has awesome gamification features but limited reporting, is that OK?)

- Are you paying extra for features that should come standard?
  (For example, everyone is focusing on mobile learning, and so everyone offers it standard now. Are you paying more for an "extra" mobile platform feature?)

Questions to Determine Value

Easy implementation and seamless integration:

- Is implementation easy?
  (If so, it could mean that you can start using the system earlier and see the benefits sooner.)

- How do they walk you through the process?

- If the integration is seamless, does that save on consulting and implementation fees?
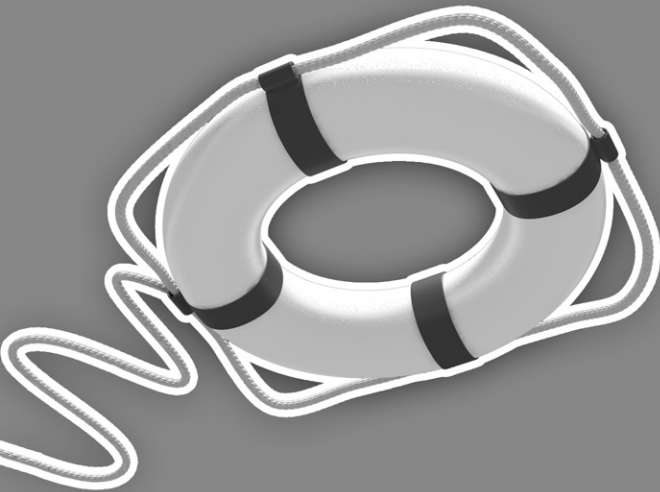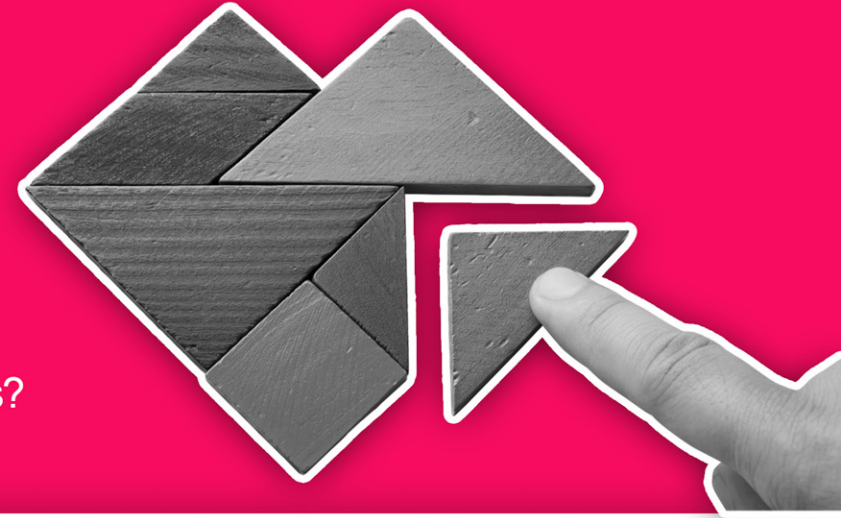
Support:

- What kind of support is there?

- Can users directly access the support? Even if they are on the road or at another location?

- What training and support is offered to administrators to get them up to speed?

- Do they find that the provider is still responsive? Or do they forget about you after a while?
  (Try to talk with some existing clients that work with a content provider, and have done so for a while.)

Evaluating Your Learning Strategy

Back to the Beginning

Developing a corporate learning strategy requires knowing both where your organization is currently and where you want it to be in the near-to-mid future.

To know where your organization currently is, you have to understand your audience, your needs, and, of course, your learning culture.

To see where your organization needs to go, you will have to think hard about your core competencies, and then think about the programs, tools, partners, and metrics needed to instill these competencies in your employees.

Using the seven questions in this book is a great start to doing these things. You might find that you are doing many things right. Chances are good that there are also several things you could be doing better.

HSI offers training, safety management and compliance solutions for businesses of all sizes. Our combination of technology and content solutions help safety, human resources and operations leaders train and develop their workforce, keep workers safe and meet regulatory and operational compliance requirements.

Further Reading

A deeper dive into the idea of Learning Ecosystems and how strategy binds their elements together: *ej4, The Learning Ecosystem: What a Learning Ecosystem is, its parts, and its impact on organizations*

A definitive guide on how off-the-shelf video content adds value to your training program: *Ways Off-the-Shelf Content Brings Value to Your Organization"*

A helpful checklist to evaluate eLearning content providers: *How to Buy eLearning Content for Your LMS (And Not Regret It Later)*