A Set of Best Practices for Targeting, Aligning and Measuring Learning

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EXECUTIVE SUMMARY

Learning expectations have never been higher. Changes in the global marketplace and workforce demographics are pushing the need to leverage human capital as a competitive differentiator. In response, savvy chief learning officers are regarding training investments as an investment that can further strategic results. Companies that adapt these shifts are realizing greater market share and increased competitive advantage.
INTRODUCTION

This paper offers a set of best practices for identifying learning needs that support business priorities, align a solution and measure results. These ideas, tips and techniques were collected from the experiences of Skillsoft customers.

Why are these practices so vital? They are the foundation of a business-aligned learning strategy. As a learning strategy matures from the classroom to one that applies multiple modalities, advanced technologies, sophisticated blends and performance tools, productivity and ROI increases significantly.

Business-aligned learning also requires business acumen. While it is not likely that learning professionals will be expected to fluently analyse financial statements, understanding the company objectives and how the organization evaluates itself is imperative.

HOW EXACTLY DOES A LEARNING SOLUTION RELATE TO A BUSINESS OBJECTIVE?

Learning solutions arise when a business driver calls for a certain type of performance. By partnering with business stakeholders to define performance expectations, learning professionals can translate performance criteria to a set of competencies or skills. With the competencies and skills in place, the proper learning solutions can be aligned.

Once the learning solution is aligned and implemented, it is critical to share results with the business stakeholders. Setting goals and expectations early will provide the milestones to gauge success. It comes down to what learning professionals have been seeking to do for some time—demonstrate learning's impact to business.

The following six best practices are keys to shaping performance that delivers results:

1. Identify the business objectives and partner with stakeholders
2. Understand the business need
3. Establish goals
4. Determine the performance requirements
5. Align the learning solution
6. Develop and execute a measurement plan

The future holds tremendous opportunities to strategically expand learning across the enterprise. By applying these practices, learning teams will be able to benefit from the lessons of others and accelerate their results.

**STEP 1 - IDENTIFY THE BUSINESS OBJECTIVES AND PARTNER WITH STAKEHOLDERS**

The CEO is responsible for articulating a vision. Rarely does the CEO define the implementation approach. Rather, the CEO conveys where the organization needs to go and collaborates with the executive team as the path to achieve the vision takes form.
The executive team dissects the vision into divisional roles and defines a strategy for achieving those objectives via a business plan. Once the business plan is approved by the CEO, it is communicated down the organizational chain to department leaders and managers. The department leaders then take the business plan and translate it into departmental initiatives. If effective, these initiatives will achieve the goals outlined in the business plan and ultimately deliver the company’s vision.

Learning professionals are often approached by department managers to provide training that addresses a particular need. While fulfilling “learning orders” can keep you busy, it does not provide a contextual understanding of how the request relates to the CEO’s vision. Delivering the “order” might temporarily raise your learning utilization rates, but you may run the risk of missing subtle performance requirements that will make the difference in the long term. You are also overlooking the opportunity to demonstrate more powerful business impact.

The next time you receive a “learning order,” pause and ask questions that help you understand more about the greater business objective and anticipated impact.

If “learning orders” come to you from a department, ask how they link back to the business plan and corporate vision so you have a contextual understanding of how the request aligns. The result is likely to be a better learning solution.
IDENTIFY BUSINESS OBJECTIVES

Business drivers can also be highly visible and easy to identify, but if they are not readily evident the following might be useful:

- **Annual reports** - If your company is publicly traded, an annual report is produced to inform shareholders about past performance and future direction.

- **Quarterly reports** - While annual reports offer a wealth of great data, they only come out once a year, so the information can get a little stale. If you are six months past the annual report publication date and you need more recent data, quarterly reports offer a great solution.

- **Shareholder briefings** - Frequently, a publicly traded company will conduct quarterly meetings with investors to review revenue metrics and operational performance.

- **Operational reports** - Statistics regarding operational performance are often highlighted in an operational status report.

- **Articles and press releases** - What is your company talking about? Often what is newsworthy is also aligned with the vision of the CEO and the business drivers.

- **Internal publications and newsletters** - What are the new buzzwords and hot projects? Where is your organization focusing its dollars and resources? This is another excellent way to begin to define the business drivers.

It is important to have a basis of understanding of the key business drivers before you approach the stakeholders or before they approach you.
EXAMPLE OF BUSINESS OBJECTIVES

<table>
<thead>
<tr>
<th>Improving operations &amp; cost avoidance</th>
<th>Increasing revenue &amp; expanding market share</th>
<th>Enhancing competitive immunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving efficiency</td>
<td>Increasing sales</td>
<td>Improving customer satisfaction</td>
</tr>
<tr>
<td>Eliminating bottlenecks</td>
<td>Improving profitability</td>
<td>Improving relationship with suppliers</td>
</tr>
<tr>
<td>Improving employee morale</td>
<td>Launching a new product</td>
<td>Strengthening company image</td>
</tr>
<tr>
<td>Increasing capacity</td>
<td>Diversifying into new areas</td>
<td>Improving service levels</td>
</tr>
<tr>
<td>Decreasing expenses</td>
<td>Attracting new customers</td>
<td>Improving internal communication</td>
</tr>
<tr>
<td>Reducing staff requirements</td>
<td>Differentiating from the competition</td>
<td>Displacing competition</td>
</tr>
</tbody>
</table>

PREPARE FOR THE STAKEHOLDER MEETING

When you request a meeting, explain that you are in the process of consulting with various business leaders in the organization to define the learning solutions required to deliver on the company’s XYZ objective. Add that you would like to establish a partnership that will benefit the stakeholder in specific ways. The purpose of your initial meeting will be to identify the business needs and the value associated with impacting that need.

SAMPLE PERSONAL PITCH TO VP OF SALES

“Hello, my name is Sara Kindle. I am currently consulting with various business leaders to define the learning solutions required to deliver on the goal of 20% growth by the end of year. The benefits to you include:

- Reducing sales team ramp-up time and preserving time in the field
- Increased product awareness and confidence in positioning
- Shortening the overall sales cycle

Are you available next Tuesday at 2:30 or Thursday at 9:00 to discuss?”
UNDERSTAND THE BUSINESS OBJECTIVE

When you meet with the stakeholder, the purpose will be to agree on the business need and the value of impacting that need. Interview the stakeholder to determine which pieces of the corporate vision he/she is responsible for executing. Ask about the business plan for achieving that vision so you can understand the greater context.

Keep in mind that business needs focus on the operational goals and initiatives of the organization. There are often two types of business needs - problems and opportunities*.

• Problems are a gap between what should be occurring operationally and what is actually occurring at the present time.
• Opportunities focus on a future operational goal. No current problem needs to be fixed. Instead, an opportunity needs to be optimized.

When you approach the executive, emphasize the purpose of the meeting in straightforward terms. Explain that your goal is to understand the job performance requirements needed to carry out the initiative.

As you consult with each stakeholder, keep in mind that the primary question you are trying to answer is, “What are the business needs that you are seeking to impact?” not “What training needs to take place?”

Ask quantifying questions:

• Increased revenue? By how much? In which areas?
• Improved quality? Improved how?
• Reduction in turnover? What percent reduction?
• Improved sales? By how much?
• More satisfied customers? In what way?

*Adapted from Performance Consulting: Moving Beyond Training by Dana Gaines Robinson and James C. Robinson. Berrett-Koehler Publishers
To increase your context, it may be helpful to ask what the repercussions would be if the objective was not met.

Through these questions, you should be able to define the business value associated with impacting the objective and set the stage for establishing program goals.

**Example of a Table You Can Create to Chart Your Stakeholder Conversations**

<table>
<thead>
<tr>
<th><strong>BUSINESS OBJECTIVE</strong></th>
<th><strong>STAKEHOLDER(S)</strong></th>
<th><strong>LINK TO CORPORATE VISION</strong></th>
<th><strong>BUSINESS PROBLEM OR OPPORTUNITY?</strong></th>
<th><strong>IMPACT VALUE</strong></th>
<th><strong>CONSEQUENCES OF NOT IMPACTING</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Raise sales of X2000 product by 8% by the end of the fiscal year</td>
<td>Leslie Chamble, VP of Product Marketing</td>
<td>Achieve the lead market position in mobile devices</td>
<td>Opportunity</td>
<td>Accelerated revenue growth; Pre-empt competitive entry into AsiaPac market</td>
<td>Limited revenue growth; Loss of market share to Acme Corporation; Lack of market penetration into AsiaPac</td>
</tr>
</tbody>
</table>

**Manage Expectations**

During this initial meeting with your stakeholder, it is critical to set expectations. Proper implementation of a learning solution takes resources and time. Realizing results also takes time.

While it is not realistic to assume that behavioural changes will happen immediately, it is also not likely your stakeholders will be willing to wait a year to see results. It is important that you manage your stakeholder’s expectations regarding the deliverables and ability to see results.

**Tip:** Most organizations operate on a “quarterly” calendar, set quarterly performance goals, publish quarterly numbers, etc. If your organization functions in this way, it is a good idea to set up your data collection and reporting timetable to follow the same timing. By doing so, you ensure that your efforts remain in line with changing organizational goals and focus.
ESTABLISH GOALS

Program goals will define what you and the stakeholder aim to accomplish as a result of the learning solution. They appropriately define the role learning played within the initiative and provide a barometer to evaluate success.

As goals are drafted, make sure they reference how the changes in job performance support the business objective. The goals will drive your measurement plan and reporting requirements, so they need to be quantified. Consider using the S.M.A.R.T. model to build your goals:

<table>
<thead>
<tr>
<th>S</th>
<th>SPECIFIC</th>
<th>Link goals to a particular business initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>MEASURABLE</td>
<td>Set goals that you can assess</td>
</tr>
<tr>
<td>A</td>
<td>ATTAINABLE</td>
<td>Ensure you have the resources to reach the goals</td>
</tr>
<tr>
<td>R</td>
<td>RELEVENT</td>
<td>Verify your goals have value to your stakeholders</td>
</tr>
<tr>
<td>T</td>
<td>TIMELY</td>
<td>Set meaningful timeframes</td>
</tr>
</tbody>
</table>
THE FIVE LEVELS OF LEARNING EVALUATION

In order to ensure that your goals reflect the business alignment you are seeking to achieve, verify they qualify at level four or five on the evaluation scale. The table below describes the focus of evaluation at each of the five levels*.

<table>
<thead>
<tr>
<th>LEVELS OF EVALUATION</th>
<th>FOCUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Return on Investment (ROI)</td>
<td>Financial benefit produced by performance improvement as a result of learning</td>
</tr>
<tr>
<td>4 Business Impact</td>
<td>Measured performance improvement as a result of learning</td>
</tr>
<tr>
<td>3 Behavior Change/Job Application</td>
<td>Application of new behaviors, knowledge, skills to the job</td>
</tr>
<tr>
<td>2 Learning</td>
<td>Specific knowledge, skills and/or attitudes that have been developed</td>
</tr>
<tr>
<td>1 Reaction and/or Satisfaction</td>
<td>Level of satisfaction and reaction to the learning solution</td>
</tr>
</tbody>
</table>

DETERMINE THE PERFORMANCE REQUIREMENTS

Consider the following observations:

- “Our technicians need to work smarter.”
- “Everyone needs to become more focused on our customers.”
- “Our managers need to empower their people.”
- “We need to be more innovative.”

*Adapted from How to Measure Training Results by Jack J. Phillips and Ron Drew Stone
What does each of these actually mean in terms of human performance? What must the technicians actually do differently to work smarter? What about customer service personnel—what must they do differently if they are to be more focused on the customers? What must employees do differently to become empowered? How will you know when the company has become more innovative?

Re-engage your stakeholder to define the specific behaviours that will bring about the desired performance. How are the target audience behaving today and what performance requirements are expected going forward?

Whatever the necessary performance may be, make sure that it is clearly stated and understood. Feel free to use a table like the one below to record your conversation.

**Tip:** The realistic performance may differ significantly from the ideal performance. It may not be necessary to achieve the ideal performance in order to achieve results.

**Example of a table you can create to define the specific behaviors that will bring about the desired performance**

<table>
<thead>
<tr>
<th>BUSINESS OBJECTIVE</th>
<th>CURRENT PERFORMANCE</th>
<th>IDEAL</th>
<th>REALISTIC</th>
<th>BY WHEN?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase customer satisfaction</td>
<td>Call escalations are at 30%</td>
<td>No call escalations</td>
<td>Call escalations are reduced by 15%</td>
<td>End of third quarter</td>
</tr>
<tr>
<td></td>
<td>Average speed of answer is 2.5 minutes</td>
<td>Average speed of answer is 30 seconds</td>
<td>Average speed of answer is 60 seconds</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Average time to close case is 4.7 days</td>
<td>Average time to close is 12 hours</td>
<td>Average time to close case is two days</td>
<td></td>
</tr>
</tbody>
</table>
ALIGN THE LEARNING SOLUTION

A good place to start is to refer back to the realistic performance changes you identified. What kinds of skills need to be developed? As you break down the specific skills, identify if you already have existing content that addresses the need. If not, perhaps there is content that already exists that you could purchase. If the skill is highly proprietary, a custom route may be appropriate.

Another critical aspect is defining the learning modalities that suit the audience best. Make sure that whatever is selected, matches the level of skill you seek to attain and that the content delivery aligns well with the learning styles within the audience.

Take a look at your learning solution in the context of the performance requirements that need to take place. Does the learning solution contain content that directly targets the behaviours? Examine the performance requirements and map them the content’s learning objectives.

SKILLSOFT MAPPING RESOURCES

Skillsoft provides mapping services as a core service and offers a variety of beneficial resources that can help in a mapping effort.

Many of Skillsoft’s customers find it very helpful to use the competency models available on the Skillsoft Client Community Web site at cc.skilloft.com.

Specifically for business skills, the Skillsoft Universal Competency Mapping Tool can be utilized. The Universal Competency Tool aligns job families and roles to competencies and their key behaviours. Below is a diagram that illustrates this concept. Certification Matrix If the performance you seek relates to an industry certification, it may be helpful to refer to the Skillsoft Certification Matrix.
The matrix details which Skillsoft resources support various industry credentials. To view the certification matrix, please go to cc.skillsoft.com.

**SORTING THROUGH THE SEARCH**

Inputting keywords into Skillport's search can also help you begin to identify content that may map to your learning objectives. By viewing the description and taking a look at the resource, you should be able to identify a match. This method of using the search facility might also be used to identify books or videos via Books24x7®. The resource description and the table of contents will often help you pinpoint appropriate content. Please note that the resources available through Books24x7 are updated weekly. Therefore, once in place, a frequent update of your books mappings may be necessary.

**WHAT’S COMING?**

It is often helpful to know what content Skillsoft has planned for development so you may factor those into your map. The Skillsoft Client Community website provides details regarding Skillsoft's content build plan. The “What’s Trending in Skillsoft Content” section of the home page also showcases what’s most popular within the customer base.

If you have questions about how to relate learning objectives to Skillsoft content, your Skillsoft customer success consultant can provide assistance and offer advice.
ABOUT THE AUTHOR

Kieran began her career in the talent field more than 20 years ago. In 1999, Kieran joined CBT Systems (which was acquired by Skillsoft in 2002) and participated in the evolution of the learning industry by consulting with organizations across a wide variety of sectors and geographies. She has consulted with companies to design enterprise learning programs, implement learning and talent platforms, lead strategy engagements, and advise on measuring learning’s impact on business outcomes. Kieran has authored several methodologies and white papers, she blogs regularly and she's been featured in magazines such as Chief Learning Officer, Elearning!, Talent Management and Forbes. Kieran was also a featured on Sirius Radio's In the Workplace hosted by Wharton Business School. Today, Kieran studies the composition of successful learning and talent partnerships throughout the world.
ABOUT SKILLSOFT

Skillsoft is the global leader in eLearning with a long history of innovation. We train more professionals than any other company in the world and are trusted by the world's leading organizations, including over 50% of the Fortune 500.

We currently serve over 6,700 customers and more than 45,000,000 learners worldwide and provide continuing, hands-on support to assist them in maximizing their ongoing success.

Skillsoft has grown rapidly, with 2,500 employees across multiple locations in North America, EMEA and APAC. For more information, visit www.skillsoft.com.