



Maximize Business Impact through a Business-First Approach to Learning

Today's evolving global marketplace and increasingly competitive business environment require prioritization of organizational needs and goals, while ensuring learning initiatives drive business results. Successful companies understand the importance of designing, developing and delivering training programs and activities that meet those demands through strategic alignment with a focus on business outcomes and the bottom line.

Research conducted by Training Industry, Inc. reveals 79 percent of corporate training professionals perceive strategic alignment as the single most important process capability that enables businesses to succeed. In essence, adapting to an organization's business culture, establishing business objectives, customizing training content to meet those needs, defining performance success metrics and developing partnerships with clients are key to establishing great training outcomes.

As with all businesses that want to remain competitive, it is crucial to create training experiences that are not only strategically aligned with company objectives, but also flexible and adaptable to the ever-changing market.

To illustrate the business value of strategic alignment, let's examine a case study of a national financial institution that set out to improve its overall branch performance and customer experience. After determining that substantial changes to in-branch customer experience were required, the organization acquired, customized and implemented a new task-handling platform to streamline operations and support new ways to interact with the customer.

The organization partnered with Actio Learning to redesign and modernize training for new hires and incumbents with a comprehensive “business-first” approach to learning. This initiative required an outside-the-box solution to creating a curriculum architecture that reflected business outcomes.

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DEFINING GOALS: STRATEGIC ALIGNMENT TO BUSINESS OBJECTIVES

Companies looking to see a return on their training investment understand what it means to align complex performance and learning initiatives to business goals. In order to set objectives, it is necessary to identify key work performance areas and make specific decisions to reinforce what's working and address what's not.

The financial organization identified two major areas that required a comprehensive training redesign: technical, task-oriented training and “soft skills” training. Both areas of training and guidance for employees lacked the integration needed to create an effective and efficient way of onboarding new employees, achieving customer experience expectations and getting the most value from their training initiatives. The company's original training strategy was costly, time intensive and unable to meet business goals, resulting in low quality, inconsistent training and lower than desired performance.

To address these issues, an in-depth learning initiative was launched to determine a set of goals to support key branch and leadership roles.

The primary goals included:

- Improving quality and consistency of the new hire training experience
- Reducing time to performance
- Creating innovative ways to design and deliver training

- Identifying specific role responsibilities
- Clarifying branch leadership accountabilities and creating consistency in management activities
- Providing a roadmap for continued development in role

In order to achieve these goals, a deep-dive analysis of role-specific performance requirements and training strategies was conducted to determine high-priority performance needs, which techniques were successful, what changes needed to be made, and how extensive the overall training redesign would be.

PROJECT STEERING: DIVING INTO ANALYSIS

Realizing the need to rethink the design and delivery training process, and implement an in-depth learning and development plan, a custom, role-specific training curriculum was applied to support key retail branch roles and leadership positions.

The first phase of analysis identified design assumptions and constraints. More specifically, alignment was focused around the following attributes:

- What training needs to be implemented?
- What has to be covered and/or avoided in the training?
- What's important to the leadership team?
- How open is the leadership team to innovative ideas?

The second phase analyzed individual role responsibilities, including work outputs produced, key tasks to producing them and measuring those outputs to assess quality. By creating connection points between those outputs and business outcomes, performance gaps were clearly detected and the factors contributing to job inconsistencies were defined.

“We showed them how creating a curriculum architecture and macro-level design outputs would create business outcomes, not just design training, said Brian Blecke, partner, practice lead and senior performance consultant at Actio Learning. “It's vitally important to anchor the learning experience to critical performance outcomes and demonstrate how they link back to those business outcomes.”

DELIVERING TRAINING PROGRAMS

Actio Learning created new role-based training curriculum designs, depicted as sequential course catalogs. Using a creative blend of procedures and performance-based training to support the new platform, the training curriculum included more than 250 online resources, 88 web-based micro-training modules and a series of resources to support knowledge transfer on the job, specifically role-play and coaching. By acting out real-life scenarios, learners had the opportunity to practice performing their tasks in the new system environment, with or without customer interaction and with coach feedback. In addition, structured skill observation allowed coaches and managers to monitor employee performance and make evaluations.

In addition, a Branch Leader Playbook was created to address all four leader levels, improve leader consistency, reduce performance gaps and overlaps, and reassert clear and concise role responsibilities throughout the career development process.

MEASURABLE RESULTS

Designing, developing and delivering a training program in parallel with the new system implementation was a major challenge throughout the overall training process. As a result, Actio Learning collaborated closely with business analysts from the new system development team and field analysts from the outdated system users of the current system to organize a training curriculum focused on baseline metrics strategically aligned toward business outcomes. Ideally, identifying baseline metrics around certain business outcomes is an effective way to measure the success of the training program. However, given the time constraint and the fact that the majority of the training was process-based, training measurement was assessed based on shortened time to performance, successful navigation and consistent and accurate completion of transactions, and an increase in positive business impact.

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MOVING FORWARD

Successful organizations are changing the way learning is designed and delivered. Placing a strong emphasis on strategic alignment and how crucial it is to the bottom line, learning leaders are taking a business-centric approach to learning and delivering programs to meet the needs of the learner. In a work environment that is in a constant state of flux, maximize business impact through custom strategic learning solutions that connect business strategy to performance results.

“There's not a one-size fits all, methodological approach,” said Blecke. “Large-scale mass production training requires a great amount of creativity. The key is to be flexible and establish a process that does it well and does it fast.”

