

STRATEGIC PLANNING TOOLKIT

Creating a strategic plan is no easy feat to tackle, in fact, it can be a daunting task. It doesn't get easier when you factor in the added layer of challenges that come with learning and development (L&D), making the proper connections to demonstrate value and then communicating why it should matter to stakeholders ... but have no fear, **we have crafted and packaged the solution for you.**

The Strategic Planning Toolkit provides three templates to help you begin the journey of aligning your L&D function to organizational goals. This toolkit is meant to guide you through a deeper understanding of your organization's mission, discover alignment opportunities within your L&D function and, finally, create an overall strategy that addresses the needs of L&D and business priorities.

After working through the toolkit, you'll be able to:

- Use our framework to better understand, or define, your organization and L&D function's mission statement.
- Demonstrate and communicate the connection between organizational priorities and L&D.
- Create a strategic plan for your L&D function that encompasses overall strategies, specific action items and success metrics, while tying back to the business bottom line.

STRATEGIC PLANNING TOOLKIT CONTENTS

- 1 Crafting a Mission Statement:** What Drives Your Organization and L&D Function?
- 2 Making the Connection:** Aligning Organizational Priorities and L&D Strategies
- 3 Creating a Roadmap:** Your L&D Strategic Plan Summary

What are you waiting for? Dive in and take the first step towards strategic alignment!

This content is brought to you by Training Industry's [Strategic Planning Certificate](#). This toolkit is meant to be a jumping off point. For a facilitated deep dive into aligning L&D to organizational goals and priorities, consider this course.

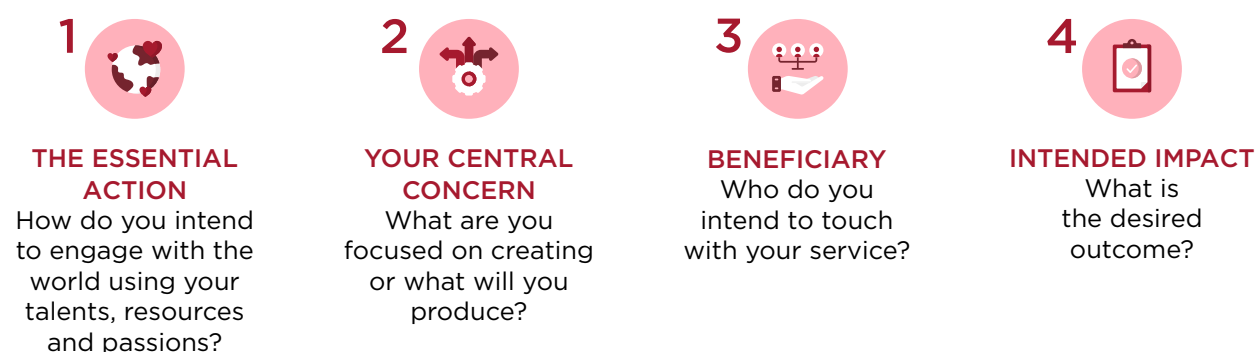
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CRAFTING A MISSION STATEMENT: WHAT DRIVES YOUR ORGANIZATION AND L&D FUNCTION?

A mission statement is **the foundation** of your company and L&D function – it should reflect your offerings and values, as well as drive strategic initiatives. The first step to strategically aligning L&D to the business is defining and understanding the mission statement.

If you're just starting out and your company or L&D function doesn't have a mission statement, you will be prompted to create one in a structured way, that considers all the relevant elements. If your mission statements are already defined, our framework will help you break them down to facilitate a greater understanding and shed light on alignment opportunities.

The Four-step Formula can be used to define or better understand your organization's mission, as well as your L&D function's mission:



Review this completed template to gain a better understanding of where to start:

EXAMPLE ORGANIZATIONAL MISSION OUTLINE: E&E SQUARED	
THE FOUR-STEP FORMULA	
Essential Action:	Provide talent development solutions.
Central Concern:	Increase employee engagement through better management practices.
Beneficiaries:	For employees and leaders in small to mid-size organizations.
Intended Impact:	Employees will stay longer, are clear about their expectations, feel invested in, perform at their optimal level and are developed for their career aspirations.
Mission Statement: Provide talent development solutions for employees and leaders in small to mid-sized organizations that increase employee engagement through better management practices so that employees will stay longer, are clear about their expectations, feel invested in, perform at their optimal level and are developed for their career aspirations.	

Follow this framework to define, or gain a better understanding of, your missions. If starting from scratch, draft definitions for each of steps, and then craft your final statement. If your mission statement already exists, work backwards to reverse engineer it until you have completed each of the steps:

ORGANIZATIONAL MISSION OUTLINE	
THE FOUR-STEP FORMULA	
Essential Action:	
Central Concern:	
Beneficiaries:	
Intended Impact:	
Mission Statement:	

L&D FUNCTION MISSION OUTLINE	
THE FOUR-STEP FORMULA	
Essential Action:	
Central Concern:	
Beneficiaries:	
Intended Impact:	
Mission Statement:	

MAKING THE CONNECTION: ALIGNING ORGANIZATIONAL PRIORITIES AND L&D STRATEGIES

Now that you have a better understanding of the mission driving your company, it's time to consider how your L&D function can support your organization's strategic priorities. Before making a business case, you should be able to complete a strategic priorities form, making the connection between organizational goals and L&D initiatives.

Making the Case for Your L&D Initiatives

The template below is designed to help you make the connections between your organization's strategic priorities and your L&D strategies. Not all organizational priorities can be supported through L&D, and L&D strategies that support certain goals may sabotage others, so it is important to be able to draw those connections clearly where they exist.

Regardless of what your unique organizational goals might be, you must, with the validation of business leaders, determine which can be supported through L&D, determine how the goals of L&D can align with those organizational goals, narrow down your focus area, and then establish a set of strategic priorities that will align with that focus area.

In the example below, business and L&D leaders determined that L&D could support goals related to people and the organization by enhancing workforce capability through performance management strategies of pay for performance culture, and goal setting processes, and training for project management competencies.

Review Strategic Priorities	Identify L&D Alignment Opportunities	Determine L&D Strategic Priorities	Determine L&D Strategic Focus Area	Determine L&D Strategies
Review key strategic priorities for the company or functional area you support.	With key business leaders, determine and validate the strategic priorities that can be supported.	Determine the strategic priorities for L&D that support strategic company	Determine and validate a set of strategic focus areas that L&D will use to support and develop strategic initiatives.	Determine and validate a set of strategies that L&D will develop to support the strategic focus areas.

CREATING A ROADMAP: YOUR L&D STRATEGIC PLAN SUMMARY

You understand your company's mission, and you've defined strategic priorities and alignment opportunities, now what? It's time to pull everything together into a strategic plan outline. Every strategic plan needs to include action items and a follow up plan for evaluating success.

Use the template below to outline the strategies, initiatives and KPIs associated with your L&D focus area. We've provided an example in the first column to get you started.

TITLE OF PLAN:				
Company Mission/Vision:				
L&D Mission/Vision:				
Aligned Strategic Focus Area:				
STRATEGIES				
<i>Manage Performance</i>				
Initiatives				
<i>Develop coaching checklists for key job roles.</i>				
<i>Develop goal alignment, setting and cascading processes.</i>				
<i>Configure workday performance cloud.</i>				
<i>Develop coaching capability in front-line managers.</i>				
Key Performance Indicators				
<i>Employee engagement scores.</i>				
<i>Percentage of employees with quarterly check-ins.</i>				
<i>Percentage of employees with goals.</i>				

WHAT IS THE STRATEGIC PLANNING CERTIFICATE?

Strategic planning and management are critical parts of your professional learning and development (L&D) toolkit, so how do you ensure that you are focused on the right priorities? Strategic planning is a journey. Creating alignment starts with a plan that connects training to organizational goals and a roadmap outlining how those goals are achieved through training processes and initiatives.

Begin your journey with Training Industry's [Strategic Planning Certificate](#), where you will receive the tools and framework you need to successfully plan and execute your training strategy. By emphasizing the strategic competencies defined in the [Training Manager Competency Model™](#), this course will prepare you for your role in ensuring your training organization's strategic plan is positioned for success.



2 HALF DAYS



CERTIFICATE
AWARDED



VIRTUAL



SESSIONS FOR
EVERY TIME ZONE



ENGLISH
LANGUAGE

COURSE OBJECTIVES

After completing this certificate, you will be able to:



Establish a common language with which to understand strategic planning as it relates to your learning organization.



Conduct an environmental and gap analysis.



Develop a strategic plan, action plan and scorecard.



Effectively communicate your plan's value and steps to stakeholders.



Conduct a planning conversation with your team and key stakeholders using the provided concepts, tools and frameworks.