TRAINING INDUSTRY

CREATING A STRATEGIC PLAN

BEST PRACTICES FOR DEVELOPING TRAINING THAT IMPROVES BUSINESS OUTCOMES

CONTENT

INTRODUCTION

In today's fast-paced business world, organizations must quickly adapt and respond to change. Developing a strategic plan can help training organizations stay ahead of change and be proactive, instead of reactive, when change occurs. This plan can serve as a roadmap to guide the decision-making process and help learning leaders deliver impactful learning experiences that improve business outcomes.

Strategic alignment is the foundation of a great training organization and a critical success factor for delivering effective training. This requires a partnership between the training function and the C-suite to discuss company goals and objectives and properly align training to achieve those goals.

With so many moving parts, this is easier said than done. Learning leaders must work to define the organization's goals, evaluate the current state of the company's talent and skills, identify key skills gaps that would prevent the company from achieving its goals, and create a plan to deliver training that will improve business performance.

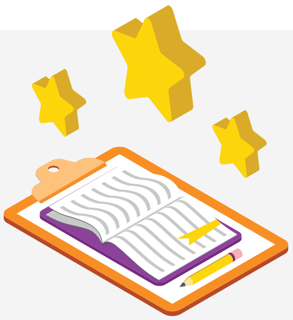
Strategic planning can help learning leaders make well-informed decisions and effectively evaluate the effectiveness of their training offerings. It's a critical step for any great training organization and provides a clear competitive advantage that can set your company and people up for tremendous success.

However, creating a strategic plan that maximizes the business impact of training can be challenging. To help, we've compiled a collection of articles that appeared on TrainingIndustry.com that share actionable tips and best practices on the strategic planning process in this e-book. We hope this content will provide you with the tools and framework you need to successfully plan and execute your training strategy.

HOW TO DEVELOP A STRATEGIC L&D PLAN

Strategic planning is critical to maintaining alignment and maximizing training's impact. It can guide learning leaders in making key decisions and provides structure for evaluating progress and tracking relevant metrics. However, creating a plan from the ground up can be challenging. Let's take a look at three key steps to developing a strategic plan.

1. Create an L&D Mission Statement



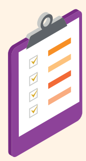
Crafting a learning and development (L&D) mission statement can **create focus** and clearly show how learning will **benefit** the organization. The statement should reflect your company's goals and values, helping to drive strategic initiatives.

2. Make the Connection

Now that you have a better understanding of the mission driving your company, the next step in developing a strategic plan is to align organizational priorities with L&D strategies.

This involves:

Meeting with senior leaders.



Establishing a set of strategic priorities.

Identifying how training can help support those goals.

3. Create a Roadmap

The L&D strategic plan is a roadmap for learning leaders, guiding the decision-making process for delivering impactful training.

Your L&D roadmap should include:

- Your company's mission statement.
- L&D's mission statement.
- Overview of company goals.
- Assessment of business challenges.
- Specific strategic training focus areas.
- Your training organization's capabilities and resources.
- Overview of training goals and outcomes.
- Key performance indicators to track.

Strategic Alignment: The Foundation of a Great Training Organization

By Michelle Eggleston Schwartz, CPTM, editor in chief of Training Industry, Inc.

Without strategic alignment, business functions would be chasing drastically different goals and objectives, resulting in little to no business impact. In times of crisis and change, like we're experiencing during the COVID-19 pandemic, the need for strategic alignment becomes increasingly important. As business priorities shift, learning leaders must ensure their training strategy reflects those changes.

For over a decade, Training Industry has been conducting research on the process capabilities and practices that define great training organizations. Withstanding the test of time, strategic alignment has been consistently rated as the most important process capability. Strategic alignment is the foundation of a great training organization, and now more than ever, a strong foundation is needed to weather a turbulent business market.

"All employees and departments working towards a set of the same goals will contribute to the overall success of the organization," says Dr. Theresa Horne, CPTM, a senior program manager working in leadership and talent development at the National Labor Relations Board. "As a training organization, our actions should always be rooted in making the business and its human assets as successful as possible."

BECOMING A TRUSTED PARTNER

To position training as an enabler to company growth, learning leaders must work closely with the senior leadership team to establish agreed-upon business objectives. This partnership provides learning leaders with a higher level of clarity and context surrounding the goals and can alleviate any miscommunication.

"When goals are communicated with the rest of the organization, sometimes, there's not that level of detail that would really help a training manager make better choices in creating that effective strategic alignment," says Kenneth Baucum, CPTM, an organizational development manager at SageNet. "Sometimes, it's just a matter of communication."

By actively listening and asking important questions, learning leaders can get the information they need to make the right decisions. But that information doesn't always come easy, says Baucum. Sometimes, it takes a little digging and persistence to find answers. In moments of resistance from leadership, learning leaders should clearly communicate that they are searching for answers to better understand the goals — not undermine them. This approach can help establish training as an ally to the business.

Having a seat at the decision-making table and being able to work closely with senior leaders is critical to creating training that is truly impactful. "Being in the conversation to lead the discussion on how training can support the various business initiatives gives the training manager insight on not only where the business is heading in the near future but also on which areas are top priorities," says Horne. By fully understanding the organization's strategic plan, training managers can highlight areas where training can maximize the potential outcome, she adds.

TRANSPARENCY AND ALIGNMENT

Ensuring strategic alignment across the entire organization is challenging. Employees and departments need to be working toward the same goals or risk cannibalizing their efforts. To ensure everyone is on the same page, it's important to regularly check in with employees. Soliciting feedback from employees is a critical part of achieving strategic alignment, says Julie Kirsch, CPTM, the director of training and development at Calibre CPA Group. "Employees may have perceived needs that are different from their supervisors, managers or leaders."

Conducting an assessment using employee surveys, interviews or a task force can help identify whether the goals of the employees and the leaders match. "Listening to the needs of the workforce and the organization's leadership will make the alignment process easier," adds Horne. Learning leaders must address any inconsistencies and identify ways to align goals across the business.

For example, Baucum found that new hire orientation programs are a great way to share company goals and maintain strategic alignment across the business. Introducing company goals to new employees during the onboarding process allows them to ask questions and better understand how their role connects to those goals. This approach increases engagement while allowing each employee to look more holistically at the company and not just his or her small part, he says.

MOVING FORWARD MORE EFFICIENTLY

Aligning training to the specific needs of the business can help organizations create a competitive advantage. Developing training that reflects the organization's culture, learner preferences and business objectives increases productivity and engagement. In fact, customizing training to meet an organization's needs is the most critical strategic alignment practice for great training organizations, according to Training Industry research.

Strategic alignment enables faster decision-making when business priorities shift. Organizations that can quickly adapt to change will be the most successful, but it requires clarity and communication of those changes across the entire business. "Strategic alignment is a very powerful tool when communicating with business leaders," says Baucum. "It prevents wasting time and helps us move forward more efficiently." So, when change does occur, learning leaders are well prepared to pivot and meet the needs of their employees.

Strategic alignment is the foundation of a great training organization, and now more than ever, a strong foundation is needed to weather a turbulent business market.

4 Steps to Achieve Strategic Alignment

By Dan Menden, CPTM, managing director of Mensch Learning Solutions.

Creating and maintaining strategic alignment between the learning and development function and the overall mission, vision and goals of the organization is the single most important responsibility of L&D leaders. No matter how much effort is put into developing cutting-edge, technology-driven learning solutions, the training will be useless unless it is aligned with the needs of the organization. There are four basic steps that, when followed and repeated on a regular basis, will ensure strong strategic alignment between the training organization and the business as a whole.

1. UNDERSTAND THE BUSINESS'S MISSION, VISION, STRATEGY AND GOALS.

Let's look at each of the four steps in more depth, starting with Step 1. The best sources for this information are the businesses' strategic plan, if one exists, and the key business leaders the training organization is directly supporting. Gather all the documentation you can find about the mission, vision, strategy and goals, and then immerse yourself in the details. When you're feeling comfortable with the documentation, set up one-on-one discussions with the key business leaders you support, and discuss their organization's objectives and how they support the goals and objectives of the overall business. Capture the goals and objectives from both sources, and document them in summary format in a way that will be easy to share with other key stakeholders. Capture as much detail as possible so that you can bake the goals and objectives into measurement of the learning initiatives.

First, understand the business's mission, vision, strategy and goals.

2. DETERMINE WHERE AND HOW LEARNING WILL IMPACT THE ACHIEVEMENT OF BUSINESS GOALS.

Share the summary you created in Step 1 with the other members of the learning and development team to gain their input. There may be some obvious strategies or goals that learning can support, such as launching new products, increasing first call resolution of customer complaints or improving safety. There may also be some strategies or goals that don't make sense for the learning and development function, and that's fine. Involve your team in this phase to build their understanding of the organization's goals and objectives and to ensure their buy-in to deliver on the plan that they will help develop.

3. DOCUMENT THE LEARNING AND DEVELOPMENT PLAN.

Once you've identified the goals and strategies the L&D team can support, it's time to move to Step 3. Once again, you should approach this process with plenty of involvement from your team, but you should also build the plan with key business stakeholders in mind. It can be a document, a spreadsheet or a PowerPoint presentation, as long as you can easily share and communicate it with a wide range of stakeholders. Include the following key elements in your L&D plan:

- Executive overview.
- Definition and overview of audience.
- Overview of business objectives.
- Assessment of client and business needs.
- Assessment of training organization's capabilities.
- Short-term objectives (12 months).
- Long-term objectives (two or three years).
- Obstacles, threats and contingencies.

Keep in mind that the L&D plan is a high-level plan designed for effective communication with key stakeholders, not the detailed plan that the L&D team will need for execution.

4. VALIDATE THE ALIGNMENT OF THE LEARNING AND DEVELOPMENT PLAN WITH THE BUSINESS PLAN.

Now that you have the L&D plan documented, it's time to circle back with the key business stakeholders you talked to in Step 1 so you can validate the alignment of the two plans. This last step is critical to gaining your stakeholders' buy-in. This step is the time to work out any issues or misunderstandings that may have occurred or changes to the business plan that may have happened since your initial discussions. Make sure to ask for the support you need from your key business stakeholders, and be clear about their responsibilities to help deliver on the L&D plan. After this validation and commitment step, you are finished with your strategic alignment work, and it's time to roll up your sleeves with your L&D team to make good on delivering the plan.

Ask for the support you need from key stakeholders,
and be clear about their responsibilities.

FINAL THOUGHTS

This process of strategic alignment will feel like a lot of work the first time you cycle through the process, just like how a farmer feels the first time he or she plows a new field. It's a lot of work clearing all the rocks, boulders and old tree stumps, but it will be easier the next time through the field. The timing of the strategic planning process is also critical as you want to line up this process with the business' annual budgeting and planning processes. That alignment will provide you the opportunity to gain stakeholder budgetary support as well as critical information for building your budget for the next year. A great plan without resources will have little chance of success.

Now that you have the basics of strategic alignment, don't hesitate to jump in and get started! The effort will be worth it both for the L&D function and your credibility as the professional leading the charge.

5 Tips for Creating a Strategy That Builds a Culture of Learning

By Michael Bernard, co-founder of strategy consultancy at House of Strategy.

Like so many other functions within organizations, training has been undergoing a rapid transformation in the last couple of years, with companies having to rethink learning technologies, education needs and whether to provide services internally or to outsource.

Despite these fast-moving pressures and changes, the fundamentals remain important: building an organization in which constant learning refreshes the workforce's skills and capabilities. These five key considerations are how an effective training strategy can be constructed and contribute to the right culture of constant learning and development (L&D).

1. START WITH YOUR PURPOSE.

While this might sound a bit remote, every good strategy has foundations built on purpose (and vision and mission). Understand the broader purpose of the company and then consider what your function exists to do. Don't confuse what you do with why you do it. The purpose is all about why, and that leads to an understanding of what the plan is to deliver. It's not to deliver courses, qualifications or certificates. It's about having a workforce that has the skills needed to complete in your market, now and in the future.

2. DEFINE YOUR GOALS.

Of course, your strategic goals need to be SMART goals (specific, measurable, attainable, realistic and time-bound). Even more important than that, they should be linked to the outcomes the organization needs, not to activities. For example, setting a goal that everyone will undertake at least 40 hours of education a year will lead to the wrong behaviors (management pressure at year end, sitting in front of online courses without motivation, and so on). The outcome that is needed — as mentioned above – is that your employees are learning the right things and are motivated to keep learning. Finding the right metrics can be extremely tough, but it should be possible to find direct or indirect (proxy) measurements that demonstrate the impact of training.

3. CONDUCT A NEEDS ANALYSIS TO IDENTIFY FUTURE-FORWARD SKILLS.

If a training needs analysis is done well, it can make the decisions you need to make very clear. Done poorly and you will find the organization stuck where it is because you don't understand the industry trends and the implications for education, training and skills. All too often, the analysis (or diagnosis) stage is completed quickly by someone filling in a SWOT chart (strengths, weaknesses, opportunities, threats), or a variant of that, and then moving on to a PESTLE chart (political, economic, social, technological, legal, environmental). Having filled these in, they are then frequently ignored, as if the act of completing them is sufficient. These are good tools, but only if used properly. At this stage, you should be looking externally to see what options there are for additional training support, such as apprenticeships. Don't restrict your horizon to your own industry. Some of the most interesting developments can be found in other sectors.

As a minimum, form a view of the key changes the organization needs to make in order to keep up with the learning and training requirements of your industry. Even better, consider how you can get ahead of the curve and equip people better than your competitors so you can form part of the company's sustainable competitive advantage.

4. LAY OUT YOUR STRATEGIC INTENT CLEARLY.

Explain your strategic intent for building a learning culture in a short and simple statement. Next, explain the actions that you will take to deliver the intent. You don't need too many. It is usually four or five key actions, with clear (SMART) objectives for each. These are the key changes that your strategy will be driving. Here's where your actions spell out, for example, whether you will outsource some or all of your training delivery or how you will deliver learning to a workforce that is now remote or hybrid. Be careful not to describe what you do as a matter of course. For example, an information technology (IT) department strategy that said it would implement high quality cybersecurity only begs the question of what it has been doing until now.

5. LASTLY, AND MOST IMPORTANTLY, EXECUTE.

Many organizations have a process for creating, reviewing and approving a strategy, but then do nothing with it. It goes into a folder and 10 months later is brought out; dates are changed, and it is re-approved. This is the number one mistake made about strategy, in organizations large and small. Any strategy that is executed will be better than business as usual, as long as the company is able to learn from what goes well and what doesn't. Avoid making the most common error and do what you planned to do.

A key part of execution is effective communication. Explain what you are doing, and why. Demonstrate why it is different to what has been done before, and how – if done well – it will deliver what the organization needs. Communication is a difficult thing to get right. If you have an internal communications team, engage with them and enlist their help. The strategy is going to be valid for a long time, maybe several years, so keep the communications consistent. A burst of communications followed by silence tells people that this is a management fad, not a serious initiative.

Culture is the hardest thing to change in any organization. If you want to shift it, then lead from the front. Show how you and the leadership team are taking the medicine and benefiting from it. Make the execution part of the day to day management system. If you don't take it seriously, why should anyone else?

Understand the broader purpose of the company and then consider what your function exists to do.

Adjusting Your L&D Plan During a Crisis: A 4-step Process

By Sarah Gallo, CPTM, senior editor at Training Industry, Inc.

According to Training Industry research, strategic alignment is the most important process capability of great training organizations. And while many training organizations considered strategic alignment a strength before the pandemic, the crisis has made it difficult to align training initiatives with business goals. In fact, a recent Training Industry pulse survey found that only 20% of learning professionals feel confident that they know what their stakeholders' current needs are. Among respondents who do feel confident of their stakeholders' current needs, many reported being unsure about whether or not they can deliver training initiatives that address them.

So, how can learning leaders achieve strategic alignment when businesses are constantly pivoting in light of COVID-19? How does one plan for uncertainty?

It starts with reevaluating your learning and development (L&D) plan. Follow this four-step process to begin.

STEP 1: CONNECT

Nothing is certain in today's business environment. Nearly all industries have been impacted by the coronavirus pandemic in one way or another. As a result, companies worldwide are reevaluating their "strategic priorities and daily practices," says Noelle Akins, president of Akins & Associates and founder of the coaching program Type A in a Healthy Way.

Now more than ever, learning leaders must consistently communicate with stakeholders to stay on the pulse of evolving business needs. After all, "Crises are times that require an extra effort to communicate and keep everyone connected," says Gal Rimon, founder and chief executive officer of Centrical. By staying connected and aligned with stakeholders, when business priorities shift, learning leaders can deliver training initiatives with "amazing synchronicity."

Akins agrees that training professionals should partner closely with business executives to "explore together how you can co-create a way forward so that L&D can help build [organizational] capabilities and skills that facilitate business success."

Reevaluating your L&D plan is not a one-and-done process.

STEP 2: PRIORITIZE

After communicating with stakeholders to determine business needs, identify which training initiatives in your current L&D plan align with them. Keep the learning initiatives that are "core to your foundation," and eliminate the ones that aren't, Akins says. It's also important to prioritize learning initiatives that address foundational skills. After all, "all industries, during this disruptive time, are seeing the need for strong leadership, emotional intelligence and change management competencies," Akins says.

Matt Donovan, chief learning and innovation officer at GP Strategies, echoes this sentiment: "We have to make room for emotional intelligence," he says. "Our plans [and] our strategies have to be more empathic than ever."

The coronavirus pandemic has caused most companies that can go remote to do so, making soft skills even more vital to business outcomes. For example, Donovan says, sales reps must learn how to connect with clients virtually, which requires greater emotional intelligence and empathy than when meeting face to face.

Your L&D plan should include training initiatives that help learners "connect virtually" to ensure business "goes on as usual" during the crisis. While in the past, we may have separated "business from the emotional" and "empathy from vision," during a crisis — and in the future of work — "they need to be more connected than ever," Donovan says.

STEP 3: ADAPT

It is important to prioritize learning initiatives that address key business goals and teach foundational skills. But don't be afraid to pivot. During the crisis, business priorities will change. Certain goals may be put on hold, and others may arise. And you can expect the "speed and intensity of change" to continue to build, Akins says.

As a learning leader, you "need to be able to shift on the fly," Rimon says. The expression "he who hesitates is lost" could not be more appropriate in today's business climate. Not only must learning leaders ensure their L&D plan is aligned to business priorities, "they need to be able to put it into action at a moment's notice."

According to LinkedIn's 2020 "Leading with Learning" report, 68% of L&D professionals agree the level of urgency around launching learning programs has risen significantly during the crisis. To keep up, training professionals must have reskilling and upskilling initiatives "ready to go" when priorities shift, Rimon says.

It may seem risky to try something new during a crisis. Why adopt an emerging learning technology or new delivery method if you can stick to what worked in the past? According to Donovan, the answer is simple: The way L&D organizations have operated in the past "will not work in the future." Now, he says, is the time to "lean into innovation."

Some organizations have already used the pandemic as an opportunity to "completely reimagine" their priorities and how they deliver on them, says Jane Sparrow, founder of The Culture Builders and author of "The Culture Builders: Leadership Strategies for Employee Performance." By swiftly adapting to evolving business needs and embracing innovation, you can keep your L&D plan sharp and ready to drive change.

STEP 4: REPEAT

Reevaluating your L&D plan is not a one-and-done process. It is a continuous commitment to the business of learning. After communicating with stakeholders to identify business needs, prioritizing learning initiatives accordingly and adapting as needs change, repeat the process. Constantly reassessing your L&D plan will help ensure the training function continues to drive business results during these uncertain economic times. Doing so will reiterate your value to the business and, ultimately, Akins says, prove that L&D is a "critical business enabler" positioned to lead your organization through uncertainty and into the future.

As a learning leader, you need to be able to shift on the fly.

Use What's in Your Hand: Creating an L&D Plan With Lean Funding and Resources

By Dr. Kristal Walker, CPTM, vice president of employee well-being at Sweetwater.

It's easy to create a learning and development (L&D) strategy with a team of professionals who are equally passionate about aligning organizational goals with individual learners' development needs. Unfortunately, most L&D professionals are challenged to quench the learning thirst of thousands with two fish and five loaves of bread — or one L&D expert and a very limited budget.

L&D teams with limited funding and people resources can look to design thinking methods to establish a framework that is replicable across industries. This framework serves as the foundation of countless possibilities when it comes to creating timely and relevant training that meets the ever-changing needs of today's marketplace. The three-part framework illustrated below defines the actions L&D professionals should take before creating and implementing a formal L&D strategy.

1. GAINING EXECUTIVE BUY-IN

Adopting an effective L&D strategy begins with senior leaders' buy-in. The most successful L&D professionals have learned that executive leaders speak a different language than the average employee. I refer to it as their "leadership language," and it illustrates the priorities they focus on to demonstrate their value to the business — and, in some cases, to the world.

While employees tend to have a 90-degree perspective on their projects and tasks, executive leaders concern themselves with priorities that far exceed the tactical to-dos of an eight-hour workday. The leaders are accountable to shareholders, governing boards and large teams, who charge them with viewing the business from a 360-degree perspective to ensure all of its moving parts are effective and efficient.

Finding ways to incorporate an executive's leadership language into a formal L&D strategy is a quick way to gain executive sponsorship for training. It also improves the L&D leader's value in the organization, as it supports the perception of alignment between organizational strategy and intentional training initiatives.

An executive's leadership language is not always evident in day-to-day operations, and L&D leaders must sometimes seek out this information using both "mega-channels" — conventional approaches such as company news, town hall meetings and financial reports — and "micro-channels" — relational approaches such as one-on-one check-ins, team meetings and direct asks. Most importantly, L&D leaders should determine ways to convert leadership language into training opportunities that they can implement in multiple modalities and then measure to maximize return on investment. This approach enables executives to see their priorities in action.

2. ALIGNING EMPLOYEE SKILLS GAPS

It's no secret that a satisfied customer experience translates to repeat business. An unfavorable customer experience, on the other hand, can always be traced back to an employee skill gap. For example, if a product or service is not available, the employee can still demonstrate the skill set necessary to win the customer's confidence. Having the interpersonal communication skills and emotional intelligence to handle concerned customers can be the saving grace for repeat business. When an employee lacks those skills or does not have the capacity to adjust in real time, customer satisfaction is nearly impossible.

The challenges for L&D professionals is that not all employees are willing to expose their skill gaps for fear of being replaced, demoted or terminated. The truth is, though, that no matter how seasoned we are in our professions, there is always something new to learn. When skill gaps are not apparent, employees' managers can be a good source to collect feedback on strengths and development opportunities.

Hiring and selection processes present also opportunities to address the skills gaps of an entire team. If hiring managers are strategic about their decisions, not only will they search for candidates who can fill apparent skill gaps, but they will inevitably hire the right person for the job.

Aligning employee skill gaps with customer needs creates both short- and long-term wins for the L&D team. If the team can identify key performance indicators (KPIs) in the process, then the training they create to bridge those skills gaps becomes much more valuable. The illustration below provides a basic formula for ensuring that an organization's L&D strategy meets the basic needs of both internal (employees) and external (end users of the company's products and services) customers.

3. PARTNERING WITH STAKEHOLDERS

As the role of the learning and development professional shifts into organizational development and talent management, L&D professionals are challenged to do more with less. This challenge requires strategic partnerships with stakeholders across departments and business sectors. It also enables these partnerships to optimize the employee life cycle by offering just-in-time training, communication and performance management tools and resources to the appropriate audiences.

Despite any training, communication or performance management tools that exist, it's important for all stakeholders to be realistic about what training can occur and when. The most successful partnerships have used the employee life cycle to create multi-year L&D strategies and allocate funding and human resources accordingly. While creating a strategy that optimizes the employee life cycle may require time and effort on everyone's part, it's imperative to address each phase. When the employee life cycle is not well thought-out, it may become evident with attrition, a disengaged workforce, or even a negative hit to the company's brand and reputation.

Partnering with stakeholders to develop and implement an L&D strategy demonstrates a commitment to the value of training within an organization. Every department that will be impacted by the training should have a representative stakeholder to weigh in on the initial needs assessment, training opportunities and applicable KPIs. For teams with lean resources, stakeholders from other parts of the organization can serve as extended members of the L&D team.

L&D teams with limited funding and people resources can look to design thinking methods to establish a framework that is replicable across industries.

Strategic Planning: Map Learning for Performance Results

By Ajay Pangarkar, CTDP, FCPA, FCMA, and Teresa Kirkwood, CTDP, co-founders of CentralKnowledge.com and LearningSourceonline.com.

We are all living in interesting and exceptional times. This unique, globally shared moment in human history is bringing about unprecedented changes likes of which no living person has ever experienced. This isn't something that plays well into any business leader's established plans. If you could get into their heads, you'd see some are challenged as what to do to regain stability for survival, let alone success … or, do they know?

Change and uncertainty are annoyances for every stakeholder. And over recent years, or even decades, change reigns supreme causing significant consternation for decision-makers in every business and industry. It should come as no surprise that stakeholders are desperately seeking for some level of certainty and assurance. Strategic planning is one tactic that can help but, for it to work, it must be done well.

Developing an effective strategy isn't a one-and-done process: It's a fluid effort, and stakeholders must first look inward to ascertain how well their organization can weather unexpected events. This means focusing on operational elements they control and can leverage to meet unforeseen threats.

During times of change its often the organizational enabling activities that build stakeholder confidence. Attention is placed on the most relevant activities such as information technology (IT), human resources (HR) and, of course, learning and development (L&D). Did you notice the common denominator between these functions? These are all operational areas that enable learning and knowledge transfer.

Stakeholders who consider learning a key to weathering the unexpected may surprise you. They may not place you, as a L&D professional on a pedestal, which some practitioners expect, but know that you're essential to their survival.

GETTING ALIGNED

Making employee knowledge accountable is an elusive objective for both stakeholders and practitioners. Simply, it's about improving operational performance. But before trying to address every operational need, take a step back. Discover how to align with their strategic expectations so you can demonstrate tangible operational results.

Be practical. First, study the two areas that will bring your learning efforts into focus: Dissecting your organization's mission and then seeing how it aligns with the performance framework.

Every mission defines a company's reason to exist. When crafted well, it communicates to internal staff direction and expected operational results. Deciphering the mission into its practical elements reveals the operational activities expected to deliver value, or improving performance, for the organization.

Next, determine the operational values that stakeholders expect the mission to deliver. This is informally known as the company's "value proposition" and formally as its "value discipline." The three disciplines (organizations typically seek to master one) are: customer intimacy (a focus on customer loyalty), product leadership (a focus on innovation) and operational excellence (a focus on efficiency). The value proposition should dictate where to focus your learning efforts and resources.

For example, Starbucks was first to mass-market European-styled specialty coffees. Due to increased competition, they transitioned from product leadership to customer intimacy, or focusing specifically on what customers expect.

Think about what's involved when you order a Starbucks coffee. Consider learning's role ensuring baristas worldwide repeatedly deliver a consistent, precise, and timely coffee. It involves more than just sending them to a course to learn how to make coffee. It's not that simple.

Starbucks' learning team embraces the mission and fully aligns with its value proposition. They enabled and operationalized their learning efforts.

CONNECTING THE DOTS

Respecting the organization's mission and understanding the value proposition won't necessarily deliver the answers you seek. Doing so only provides relevance for learning. But stakeholders expect learning to bring about measurable connections delivering operational results. This is when practitioners worry. Don't fret, stakeholders are giving you the answers: They clearly map out specific activities leading to expected results. You just need to ask the right questions to connect the dots.

Every (successful) organization operationally maps out their mission and value proposition within a performance framework. This is called strategy mapping and is part of what is commonly referred to as the balanced scorecard.. Combined, this framework translates (operationalize) high level strategy elements into tangible key performance metrics, or key performance indicators (KPIs). This is your opportunity to get quick wins and demonstrate accountability for your training programs.

The framework typically focuses around four operational areas: financial (the impact on financial results), customer (what delivers financial results), processes (what satisfies customer needs), and learning and growth (the elements in place to support processes). Mapping it visually illustrates interdependence among the various operational activities.

Once you identify the operational interdependencies, seek out their performance objectives and what KPIs learners are expected to achieve. Next, it's time to conduct a needs assessment to account for the skills learners already possess and may need in the future. Then, plan and develop appropriate learning interventions that correlate to their KPIs. Be sure not to overlook other operational factors and areas that may affect learners' performance.

Leveraging the framework is like reading a roadmap: Your stakeholders have a destination (i.e., mission) and will diligently allocate resources to the value-added activities to arrive at that destination. Visualizing the operations (i.e., strategy mapping) helps to target where learning can make relevant and value-focused connections.

NEXT STEPS

Make no mistake, every operational activity, including learning, is accountable for its resource use to deliver results. Regretfully, practitioners often cede learning decisions to internal stakeholders. This reactionary behavior (i.e., order-taking) occurs either when learning doesn't add tangible performance value or worse, attempts to address every operational issue with ill-conceived training efforts.

It's time to take back control. Every organization if facing uncertainty and continuous change which means stakeholders need L&D now more than ever. Answer their call by knowing the business intimately through its mission, partnering with operational areas fulfilling their value proposition, and demonstrating training impact improving their KPIs through the performance framework.

If learning isn't delivering demonstrable value, then your efforts are irrelevant. Never forget that learning is a business within a business, and is expected to deliver business results accordingly. To make stakeholders think twice about reducing your budget, make learning relevant and accountable.

Developing an effective strategy isn't a one-and-done process: It's a fluid effort, and stakeholders must first look inward to ascertain how well their organization can weather unexpected events.

ADDITIONAL RESOURCES

Developing a strategic training plan is challenging. Check out these additional resources from TrainingIndustry.com:

Podcast Episode: Great Training Starts With Strategic Alignment

This episode of The Business of Learning, the Training Industry podcast, explores why strategic alignment is essential for great training, key challenges and solutions to achieving alignment between training and business goals, and how to prove training's value to the business.

Infographic: Building Business Acumen: 3 Steps to Becoming a Trusted Partner

This infographic shares how business acumen can help learning leaders speak the "language of business" and become a trusted business partner. These tips can help learning leaders confidently gain a seat at the decision-making table.

Strategic Planning Workshop

This workshop will share the tools, templates and frameworks you need to create strategic alignment between your training function and the business goals it supports.

Infographic: 4 Tips for Effective Internal Consulting

This infographic shares best practices on how learning leaders can develop internal consulting skills to effectively partner with key stakeholders and position learning as a strategic business asset.