

Elements of a Learning and Development Plan

A learning and development (L&D) plan is a strategic document that provides an assessment of the training function's current capabilities, how well the training organization is meeting learners' needs, and a roadmap for how the training organization plans to improve human performance and, as a result, business outcomes.

Plans are created and tailored based on the target audience:



Training Plan

Focuses on a particular program or training initiative.



Personal Development Plan

Focuses on the needs of the individual learner.



L&D Plan

Specifically looks at the training function at the business level.

While the format, content and specifics of L&D plans vary from organization to organization, the following elements are universal:



1 | Executive Overview

- ◆ Provide the reason(s) for the plan: What will your plan cover? How will it be used? Who is the audience?
- ◆ Define the training organization's high-level strategy.
- ◆ Describe how the plan was developed: Who was involved? How were decisions made regarding elements of the plan?
- ◆ Provide an overview of short- and long-term objectives and a rough timeline for execution.
- ◆ Provide a broad description of how you will measure success.



2 | Definition and Overview of L&D Audience

- ◆ Describe your learners: What roles and functions do your learners fill within the business? How many learners are you responsible for supporting?
- ◆ Describe where your learners operate: Include specifics on geographic locations, remote versus on-site learners, etc.
- ◆ Describe your learners' current capabilities, skill sets, education levels and other pertinent characteristics.
- ◆ Provide an overview of your organization's significant human resources processes, including hiring patterns, attrition rates, succession planning, career paths, and any other processes that may impact or be impacted by the elements of your L&D plan.
- ◆ Define specific incoming workforce expectations: Are there any entry-level requirements that drive new hire training, retraining or other ongoing training initiatives? What skills, prerequisite knowledge and other relevant characteristics can you expect of newly hired employees?



3 | Overview of Business Objectives

- ◆ Discuss the overall business objectives your organization plans to impact. Make sure to include a broad view of both direct and indirect impacts.
- ◆ Address any business challenges your learners face that will influence how you support their needs.



4 | Assessment of Learner and Business Needs

- ◆ Discuss how your organization assessed or will assess your learners' needs and your process for ensuring alignment between the needs of the business and future initiatives.
- ◆ Define the training needs on which your organization plans to focus. Base these needs on business objectives and the current state of your audience.



5 | Assessment of Training Organization's Capabilities

- ◆ Discuss how your organization assessed or will assess your learners' needs and your process for ensuring alignment between the needs of the business and future initiatives.
- ◆ Define the training needs on which your organization plans to focus. Base these needs on business objectives and the current state of your audience.



6 | Short-term Objectives (12 months)

- ◆ List and explain the objectives your organization plans to accomplish in the next 12 months.
- ◆ Link each objective to business goals.
- ◆ Describe how you plan to accomplish each objective.
- ◆ Provide information about how you will address any capabilities gaps identified in the training organization assessment.
- ◆ Define how you will measure success in achieving each objective.
- ◆ Describe activities you would consider including if there were additional funding.



7 | Long-term Objectives (2-3 years)

- ◆ List the objectives your organization plans to accomplish in the next two to three years.
- ◆ Describe how you plan to accomplish each objective.
- ◆ Link each objective to key business goals.
- ◆ Define how you will measure success in achieving each objective.



8 | Obstacles, Threats and Contingencies

- ◆ Discuss the challenges your organization, obstacles or hindrances your organization must overcome to achieve both short- and long-term objectives.
- ◆ Describe your contingency plans if you are not able to meet these objectives or if any unforeseen threats impact your ability to support the business.

Learn more about how the Certified Professional in Training Management (CPTM™) program can teach you to craft a L&D Plan that drives business outcomes and develop the key competencies of a training manager.

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