



# 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 accentuating the need to leverage human capital as a competitive differentiator. Companies that can nimbly adapt to industry shifts are realizing greater market share and increased competitive advantage. Instead of regarding training investments as a cost, savvy chief learning officers are positioning learning as an investment that can further strategic results.



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## Introduction

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

Why are these practices so vital? They are the foundation of a business-aligned learning strategy. As the learning strategy matures from one that uses elearning as an option to the classroom to one that applies multiple modalities, advanced technologies, sophisticated blends and performance tools... enterprise productivity makes significant gains. Skillssoft's Learning Growth Model describes this evolution through five progressive stages.

In stages one and two, the approach centers on using elearning to gain efficiencies and economically reach a greater number of learners. The learning team's efforts are primarily focused on managing classroom offerings and the transformation involved with introducing elearning. The focus is to address formal training requirements.

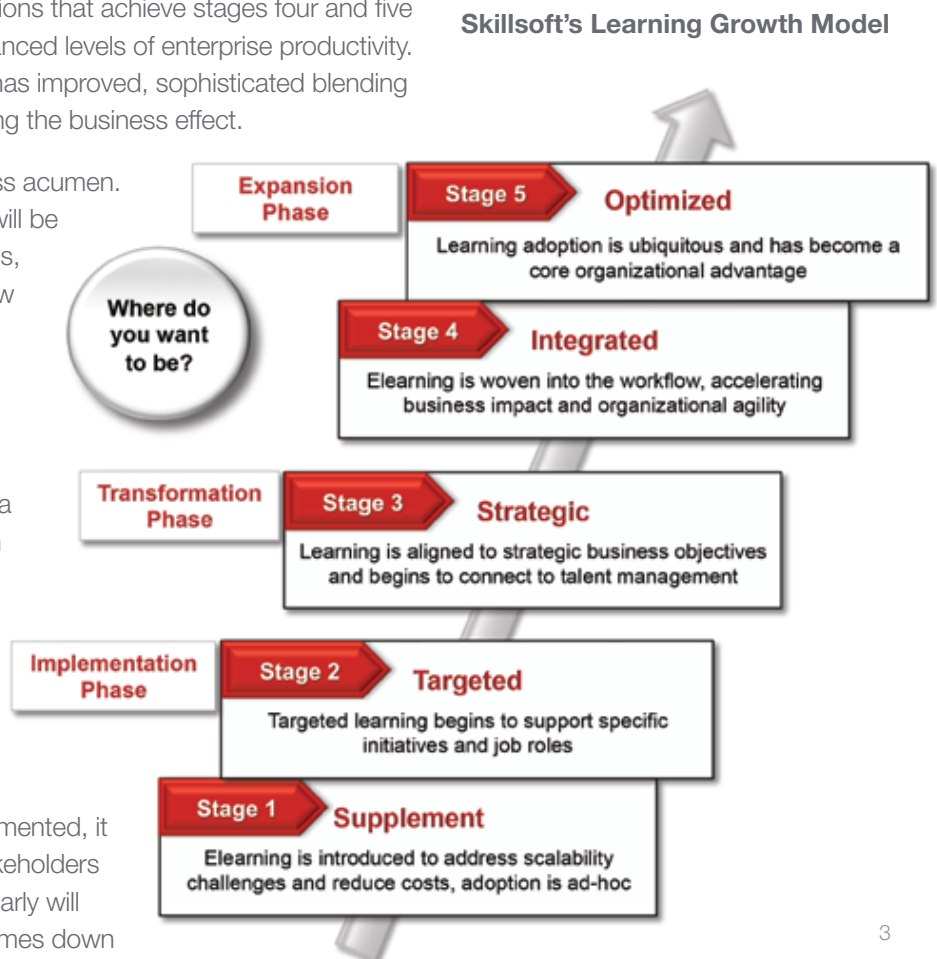
In stage three, a break-through occurs where executive leadership begins to envision the increased potential of business-focused learning. The impact of informal, on-the-job learning is also recognized. Here, the learning team applies greater emphasis toward building performance-oriented programs and strategic job competencies. In order to successfully move through this stage, the learning team begins to establish a clear and repeatable set of practices designed to target, align and measure learning impact. It is those practices that are featured in this paper.

Once the learning team has successfully transitioned through stage three, they enter a period of learning expansion. Organizations that achieve stages four and five of the Learning Growth Model experience enhanced levels of enterprise productivity. Here, the focus is on how much performance has improved, sophisticated blending of informal and formal modalities, and measuring the business effect.

Business-aligned learning also requires business acumen. While it is not likely that learning professionals will be expected to fluently analyze 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? The need for learning solutions doesn't emerge by itself. 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 in their terms. Setting goals and expectations early will provide the milestones to gauge success. It comes down

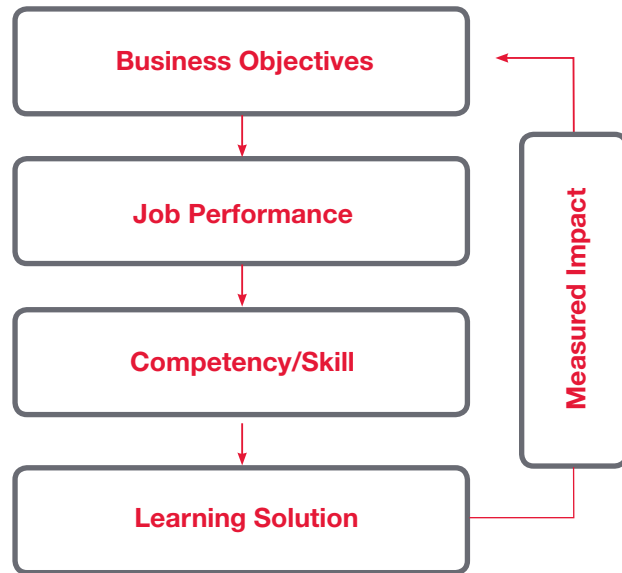


to what learning professionals have been seeking to do for some time—demonstrate learning’s impact back to the business. The following six best practices are keys to shaping performance that delivers results:

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 balance of this paper expands into each of these practices, and suggests practical tips and techniques along the way.

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.



## Identify the business objectives and partner with stakeholders

Before identifying business drivers and working with stakeholders, it is important to remember that organizations typically communicate direction using a top-down method.

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

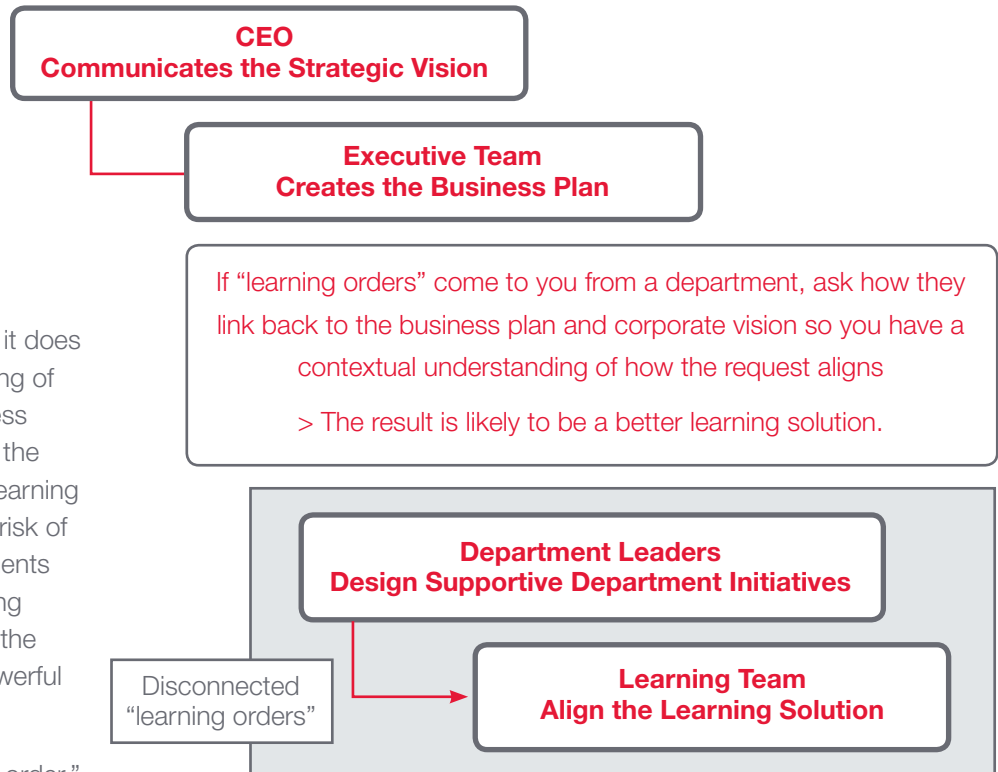
CEO, it is communicated down the organizational chain to department leaders and managers.

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.

Quite often, learning professionals are approached by department managers to provide training that addresses a particular need, much like ordering a product. While fulfilling "learning orders" can keep you busy, it does not provide a contextual understanding of how the request relates to the business plan and 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 would also be 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.



## Identify business objectives

Often, business drivers are so highly visible that it is easy to identify them. Perhaps your CEO has hosted a Web conference to explain to employees that the company is about to launch a new product line. In another scenario, the EVP of human resources might have announced a work force reduction in a town hall meeting. Maybe the sales AVP has detailed a need to differentiate the company through your new service models.

In other cases, the business drivers may not be readily evident. A variety of resources can assist you in defining the key drivers within your organization. Helpful information may be found in the following:

- 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

Improving Operations & Cost Avoidance	Increasing Revenue & Expanding Market Share	Enhancing Competitive Immunity
Improving efficiency	Increasing sales	Improving customer satisfaction
Eliminating bottlenecks	Improving profitability	Improving relationship with suppliers
Improving employee morale	Launching a new product	Strengthening company image
Increasing capacity	Diversifying into new areas	Improving service levels
Decreasing expenses	Attracting new customers	Improving internal communication
Reducing staff requirements	Differentiating from the competition	
	Displacing competition	

## Prepare for the stakeholder meeting

As you plan for your stakeholder meeting, it would be beneficial to define your stakeholder's "what's in it for me?" (WIIFM) proposition. 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 in the process of consulting with various business leaders in the organization 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?”

### “What’s in it for me?” (WIIFM) proposition

As you plan for your stakeholder meeting, it would be beneficial to define your stakeholder’s “what’s in it for me?” (WIIFM) proposition. Use the following points to plan your personal pitch:

- Business Objective
- Stakeholder
- Opening Statement
- WIIFM Benefit 1
- WIIFM Benefit 2
- WIIFM Benefit 3
- Closing Statement

## 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 the stakeholder 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\*.

- Business problems define a gap between what should be occurring operationally and what is actually occurring at the present time. Alternatively, a business problem can occur when someone in management feels “pain” about the deviation and is motivated to address the problem. Examples could be excessive waste, low sales, high production costs or reduced customer satisfaction ratings.
- Business opportunities focus on a future operational goal. No current problem needs to be fixed. Instead, an opportunity needs to be optimized. Examples of opportunities can occur when two companies merge and a return is expected with such a large investment. Or perhaps a company is bringing a new product into the marketplace, providing an opportunity that can be maximized.

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 that need to occur to effectively execute against 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?”

During the meeting, begin by briefly stating your understanding of the business need and ask if you have an accurate understanding. Then, state that your goal is to define the necessary performance requirements, align a learning solution and set goals to measure the impact.

A good place to start is to ask the stakeholder what success means to them. This is the value of positively impacting the business objective. As success is described, ask quantifying questions where appropriate:

- 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?

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

Business Objective	Stakeholder(s)	Link to Corporate Vision	Business Problem or Opportunity?	Impact Value	Consequences of Not Impacting
Raise sales of X2000 product by 8% by the end of the fiscal year	Leslie Chamble, VP of Product Marketing	Achieve the lead market position in mobile devices	Opportunity	Accelerated revenue growth; Pre-empt competitive entry into AsiaPac market	Limited revenue growth; Loss of market share to Acme Corporation; Lack of market penetration into AsiaPac

## 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 behavioral changes will take effect in a month, 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

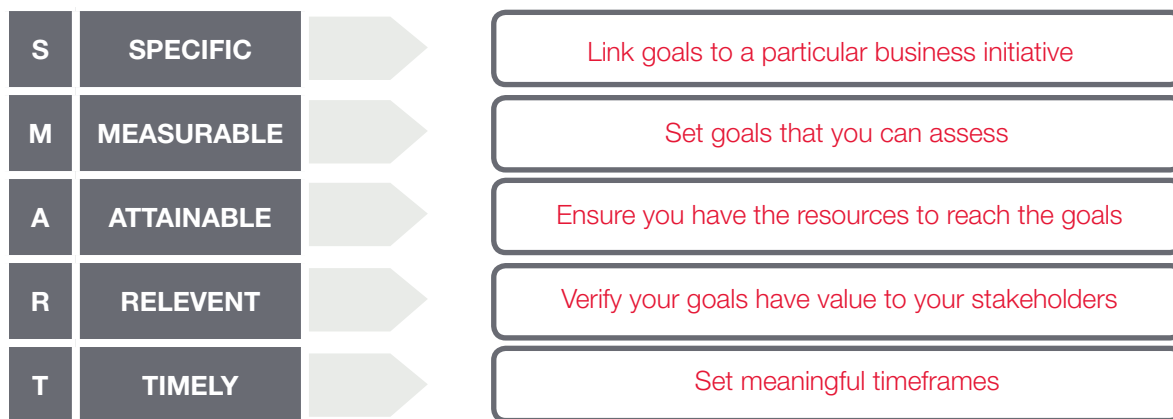


collection and reporting timetable to follow the same timing. By doing so, you ensure that your efforts remain in line with changing organizational goals and focus.

## Establish goals

Once you have an understanding of the business objective and the anticipated impact, it is important to set goals for the learning solution. The program goals 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.

What is the stakeholder's definition of 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:



## 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\*.

	Levels of Evaluation	Focus
<b>5</b>	Return on Investment (ROI)	Financial benefit produced by performance improvement as a result of learning
<b>4</b>	Business Impact	Measured performance improvement as a result of learning
<b>3</b>	Behavior Change/Job Application	Application of new behaviors, knowledge, skills to the job
<b>2</b>	Learning	Specific knowledge, skills and/or attitudes that have been developed
<b>1</b>	Reaction and/or Satisfaction	Level of satisfaction and reaction to the learning solution

\*Adapted from *How to Measure Training Results* by Jack J. Phillips and Ron Drew Stone.

## 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.”

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?

In the previous practices, we focused on understanding the business objective and defining the goals. With that foundation, you are now in a position to define how to impact the business objective to meet the goals.

Re-engage your stakeholder to define the specific behaviors that will bring about the desired performance. How is 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

Business Objective	Current Performance	Ideal Performance	Realistic Performance	By When?
Increase customer satisfaction	Call escalations are at 30%	No call escalations	Call escalations are reduced by 15%	End of third quarter
	Average speed of answer is 2.5 minutes	Average speed of answer is 30 seconds	Average speed of answer is 60 seconds	
	Average time to close case is 4.7 days	Average time to close is 12 hours	Average time to close case is two days	

## Align the learning solution

An essential part of designing a learning solution is to align the right content to the target audience. 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 or blend that will suit the audience best. Make sure that the medium(s) that are selected match the level of skill you seek to attain and that the content delivery aligns well with the learning styles within the audience.

## Mapping behaviors to learning objectives

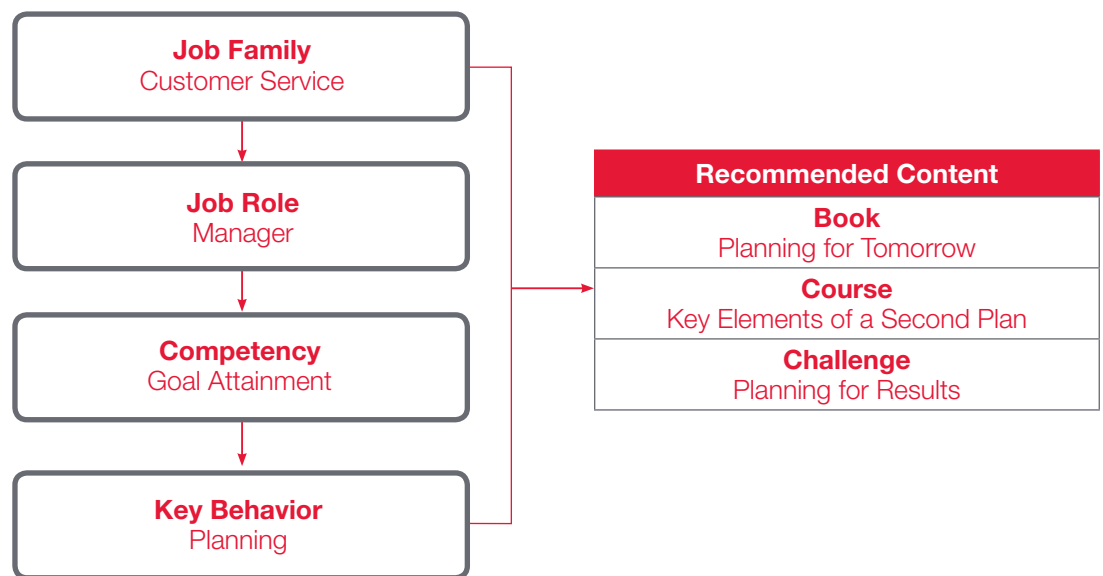
Take a look at your learning solution in the context of the performance requirements that need to take place. Does the learning solution contain content that directly targets the behaviors? Examine the performance requirements and map them the content's learning objectives.

## Skillsoft mapping resources

Where do you begin to identify what Skillsoft learning assets will help meet the objectives? Skillsoft provides mapping services as a core service and offers a variety of beneficial resources that can help in a mapping effort.

### Competency models

Many of Skillsoft's customers find it very helpful to use the competency models available on the Skillsoft Client Community Web site at: <http://community.skillsoft.com>.



Specifically for business skills, the Skillsoft Universal Competency Tool can be utilized. The Universal Competency Tool aligns job families and roles to competencies and their key behaviors. 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: <http://community.skillsoft.com>.

### Sorting through the search

Inputting keywords into Skillport's patented Search & Learn® 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 Web site provides build plans in the “Course Catalog & Content Development” section of <http://community.skillsoft.com>.

If you have questions about how to relate learning objectives to Skillsoft content, your Skillsoft learning consultant can provide assistance and offer advice. As you establish your mapping approach, a table such as the one below might be helpful.

## Organize the resources in meaningful ways

Consider how the mapped resources can be arranged on your delivery platform. Is there a way to structure the content so it can be easily located and accessed by your target population? Skillport and Books24x7 offer capabilities such as learning paths, My Plan assignments, corporate folders and web services to organize and target specific resources to learners. Partner with your Skillsoft learning consultant to discuss the best ways to leverage Skillsoft delivery capabilities.

## Develop and execute a measurement plan

After determining the goals and appropriate learning solution, you are ready to develop a measurement plan. Data collection is a critical piece of the process since the analysis will only be as good as the data itself. Part of managing the relationship with your stakeholder will involve gaining agreement on the measurement plan before you begin to execute.

## Intervals of data collection

Think about the performance you are trying to develop. What is a realistic timeframe for changes to be apparent? Once you determine this timeframe, you will be able to set your first interval. You should then set regular intervals after that to re-evaluate. Measurement plans are often synchronous with a company's quarters. In other situations, a six month or annual frequency may be best.

## Data collection method

Data sources are the individuals or systems that will provide you with the metrics necessary to evaluate progress toward the goals. The individuals could be the program participants, their supervisors, the company controller (if financial details are needed), etc. Examples of data systems might include Skillport, call center tracking systems or CRM software.

Given the emphasis to quantify impact, Skillsoft offers a complimentary service to its clients so that they may estimate the time savings, cost displacement, and skill gain achieved through the Skillsoft program. To understand more, please ask your Skillsoft learning consultant about the impact analysis process.

If there is a need to compare performance before and after the learning solution has been applied, you may wish to gather baseline data before the learning solution is rolled out. If you are isolating effects, you may find it appropriate to use data from a control group before, during and after the implementation.



For more information or to learn more,  
call 866-757-3177 or visit [www.skillssoft.com](http://www.skillssoft.com)

