

# Leading the Learning Organization

## Selling Workforce Learning & Development to the C Suite

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**The knowledge residing in a company's human capital creates economic power and value**

- A. True
- B. False

# Learning is...

The process of acquiring  
new knowledge and  
expertise in people



# Agenda

**Introductions**

**Learning Culture**

**Organizational Model**

**Ground Rules for Success**

# What is your role?

- A. Learning Manager/Executive
- B. Trainer
- C. Training Developer
- D. Training Vendor
- E. Student
- F. Other

# Which best describes your organization?

- A. Private – Fortune 500 company
- B. Private – Small to medium sized business
- C. Public – Non-profit
- D. Public – Government
- E. Consultancy Firm or Vendor
- F. Other

# How would you rate your current level of alignment with your organization's business strategy?



# Learning culture...

What is it?



# Only ~ 25% of organizations have a learning culture

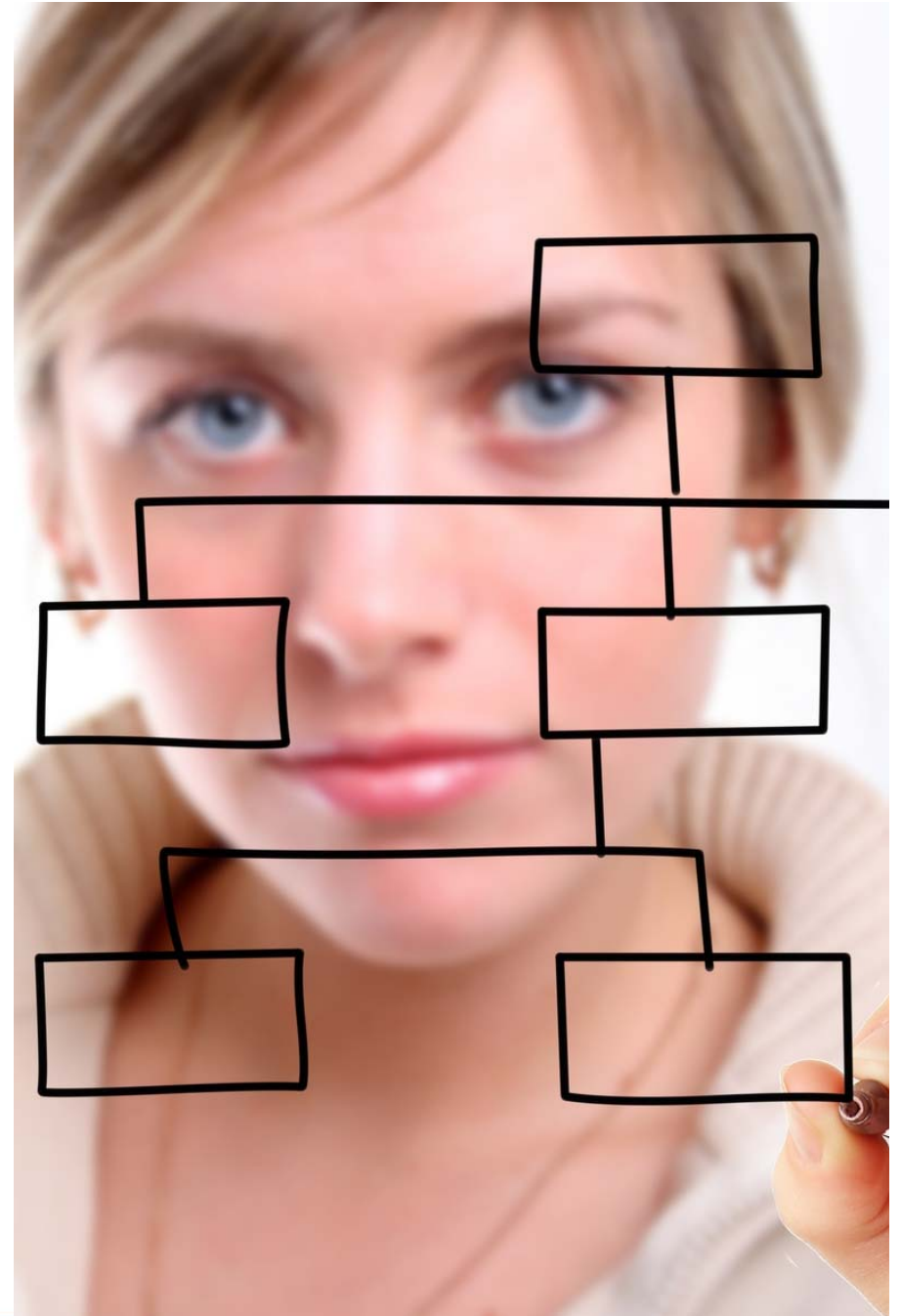
- Senior leaders of the learning organization are often rotated in from line operations
- Time and experience in L&D is considered a valuable part of a person's career in the organization
- New technologies and approaches to learning are embraced readily, even though they often fail on their first few attempts
- The organization frequently uses collaborative learning, social networking, subject-matter-driven learning, coaching and other forms of informal learning on a regular basis

# Only ~ 25% of organizations have a learning culture

- Information is readily shared throughout the organization without regard to rank or job role
- People in the L&D organization feel valued, and have high levels of retention and engagement
- Business plans and business dashboards regularly include information about talent readiness, skills and potential
- People in the L&D organization are directly connected with the business, and clearly understand the critical and urgent business problems within their organizations

# Organizational model...

How is training organized?



**Does your organization have a senior executive responsible for all company wide learning and development programs (such as a CLO)?**

A. Yes

B. No

**Does your organization have a Learning Council (e.g., cross-departmental advisory group) that meets regularly?**

A. Yes

B. No

**Do you know what/how your organization invests annually in learning and development?**

A. Yes

B. No

# Ground rules for success

Running training like a  
business...



## Step one... **develop learning strategy**

A well-run business must  
have skills and capabilities  
goals in order to succeed



# Do you have formal learning plans established?

A. Yes

B. No

## Step two... **consolidate learning plans**

Summarize the annual or multi-year strategy and operational plans for the learning organization



# Twelve plan elements

1. Enterprise learning strategy
2. Organizational budget, and resource allocation (staffing) and organization
3. Program plan (current and planned learning programs)
4. Organizational model
5. Alignment with known business initiatives
6. Alignment with HR and talent management
7. Operational measures
8. Governance process
9. Year-to-year comparisons
10. Major capital investments
11. Major commitments by quarter
12. Signoff by all major business units

# Individual learning plan components

## Individual Learning Plan

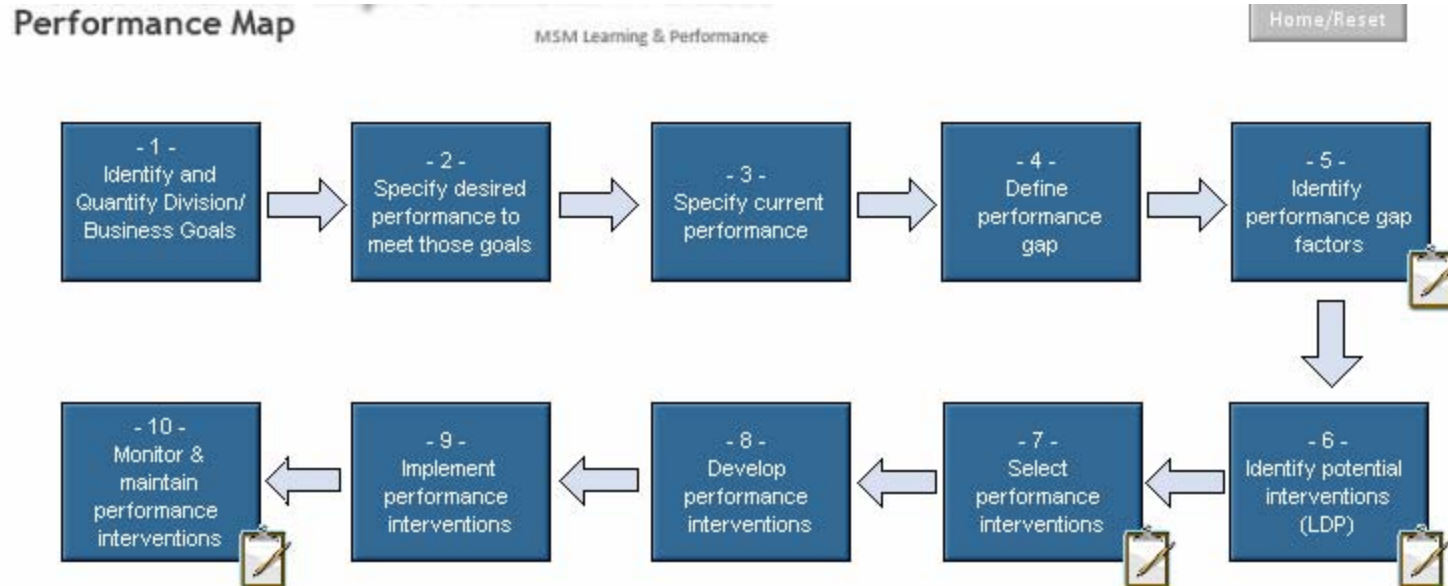
Enterprise  
Required  
Learning

Business  
Unit  
Required  
Learning

Job Role  
Required  
Learning

Discretionary  
Learning

# Performance improvement process



Besides the creation of the actual Learning Development Plan - the most critical step is the on-going engagement, follow through and the monitoring of progress (good or bad). This step will tell us what impact we are having, what's working and what's not. The Action Plan should be completed and followed up after every formal intervention.



[Action Plan.xls](#)

## Step three... **develop operational goals**

Clear metrics and upfront agreement by the business on what defines success is critical



# 2009 Balanced Scorecard

		Service				Sales				Management		Customer	Postal	Operations	
2009 Measurements of Success		VP	Director	Manager	Instructor	Director	ADM	Product	L&P Mgr	Director	Developer	Manager	Manager	Manager	Coordinator
Shareholder Value	Financial	35%	40%	45%	30%	35%	30%	15%	25%	20%	20%	35%	10%	35%	30%
	Operational Expense	25%	20%	20%	X	20%	X	X	10%	10%	X	15%	X	35%	30%
	Revenue	10%	X	X	X	X	X	X	X	X	X	20%	X	X	X
	Program Efficiency	X	20%	25%	30%	X	X	X	X	X	10%	X	X	X	X
	Performance Improvement	X	X	X	X	15%	30%	15%	15%	10%	10%	X	10%	X	X
Customer Value	Customer Satisfaction	50%	40%	45%	60%	45%	60%	75%	65%	70%	70%	55%	80%	45%	60%
	Customer Satisfaction Surveys BU Stakeholders - Net Total Satisfaction	50%	15%	15%	15%	15%	20%	20%	15%	15%	X	10%	20%	10%	X
	Customer Satisfaction Surveys Project - Net Total Satisfaction	X	15%	15%	20%	10%	20%	20%	15%	10%	10%	10%	20%	10%	25%
	Customer Satisfaction Surveys Program - Net Total Satisfaction	X	10%	15%	25%	10%	20%	20%	15%	X	10%	10%	20%	X	X
	Management Curriculum Development	X	X	X	X	X	X	X	X	30%	25%	X	X	X	X
	Management Program Delivery	X	X	X	X	10%	X	X	20%	15%	25%	X	X	X	X
	Customer Programs	X	X	X	X	X	X	X	X	X	X	15%	10%	X	X
	Customer Products	X	X	X	X	X	X	15%	X	X	X	10%	10%	X	X
	OTB (Reporting/Transparency)	X	X	X	X	X	X	X	X	X	X	X	X	25%	35%
Employee Value	Development	15%	20%	10%	10%	20%	10%	10%	10%	10%	10%	10%	10%	20%	10%
	Personal Development	X	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Employee Engagement Roll up	10%	10%	X	X	10%	X	X	X	X	X	X	X	10%	X
	Diversity	5%	X	X	X	X	X	X	X	X	X	X	X	X	X
<b>TOTAL RESULTS</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

# Program Example

## Success Indicators

The Solutions Certification will be identified as “successful” when the following is accomplished (national launch).

## Activity Metrics

- 70% targeted participant completion of requirements by July 30; 90% by August 30

## Performance Metrics

- Gap closure
  - Cross-Sell Participation Rate
  - Product Mix Growth Rate
- Pipeline lift of 10% within 90 days of certification

1	3	5
$\geq 10\%$	5.0% - 7.5%	$\leq 0.0\%$

Step four...  
**establish a governance  
process**

Execute formal reviews  
Customer sat surveys  
Annual learning report



# Governance

## Voice of Leadership (Strategic)

- CEO/other executives
- Alignment, enterprise learning plan approval

## Voice of the Business (Programmatic)

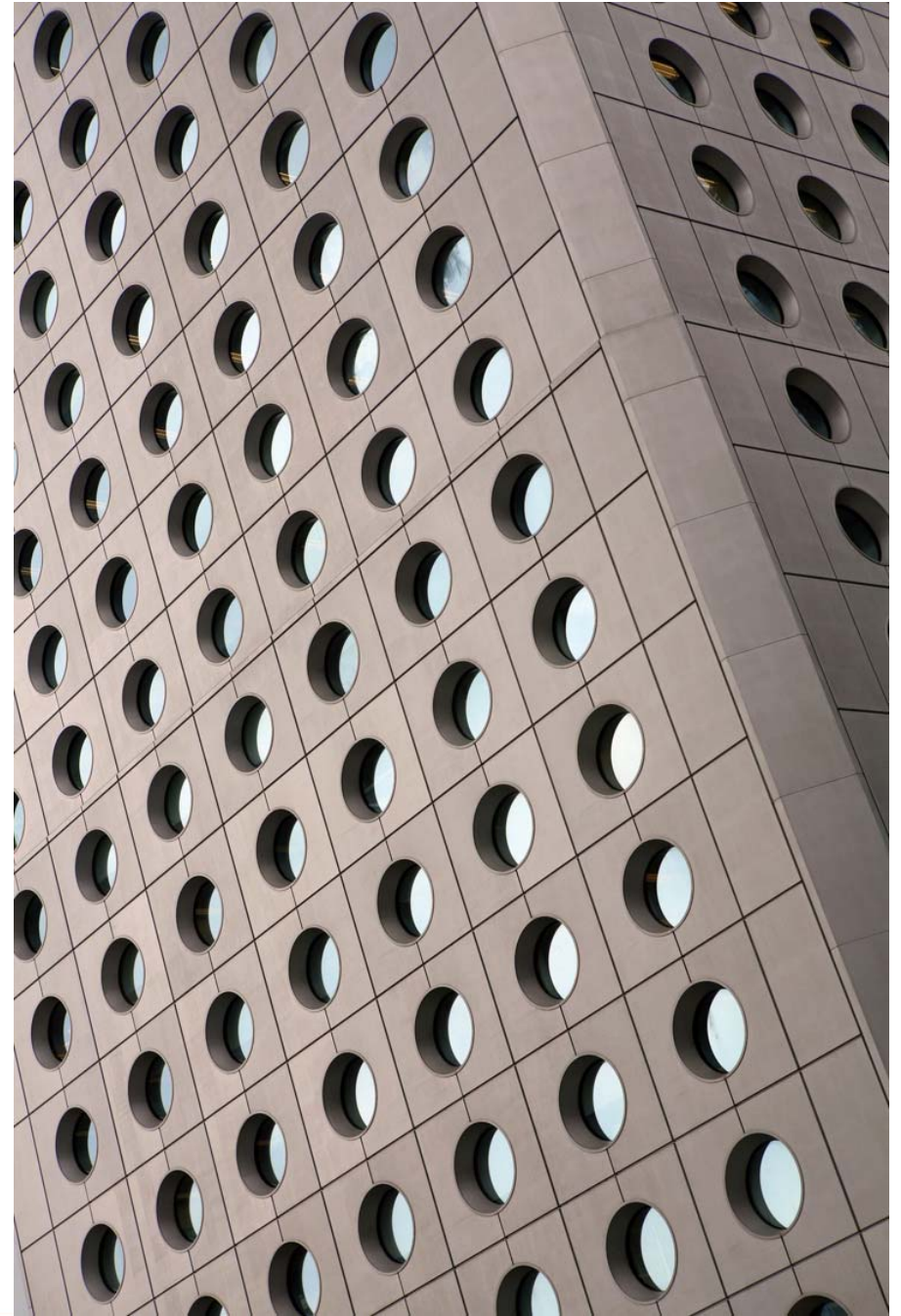
- SMEs who represent the BUs in learning affairs
- Advise on content, curricula & setting priorities

## Voice of Human Services (Operational)

- Global HR and Learning Champions
- Measuring & improving efficiency/effectiveness as outlined in learning plans, communities of practice

Step five...  
**develop a learning  
architecture & standards**

Communities of practice  
Competency models  
Assessment strategy  
Outsource strategy



# Communities of practice

**INSIDE PB**

Home | ID Standards Project | Sales CLP Team | CourseDevProcess | L&P Business Continuity | Management CLP | Service CLP Team | Operations Team

**:: View All Site Content**

**:: Surveys**

**:: Pictures**

- L&P Graphics Library
- PB Product Graphics

**:: Documents**

- Shared Documents
- EDIE Migration

**:: Lists**

- Calendar
- Tasks

**:: Discussions**

- Team Discussion

**:: Sites**

- ID Standards Project
- Sales CLP Team
- CourseDevProcess
- L&P Business Continuity
- Management CLP
- Service CLP Team
- Operations Team
- Postal CLP

**:: People and Groups**


Recycle Bin

MSM Learning and Performance Organization

**:: MSM L&P SharePoint Home**


SharePoint Portal

## MSM Learning & Performance



[L&P SharePoint HELP?](#)

[L&P PB1 Home \(Not Active\)](#)



# Course development process

Performance Support Map

[Main Page](#)

[Template List](#)

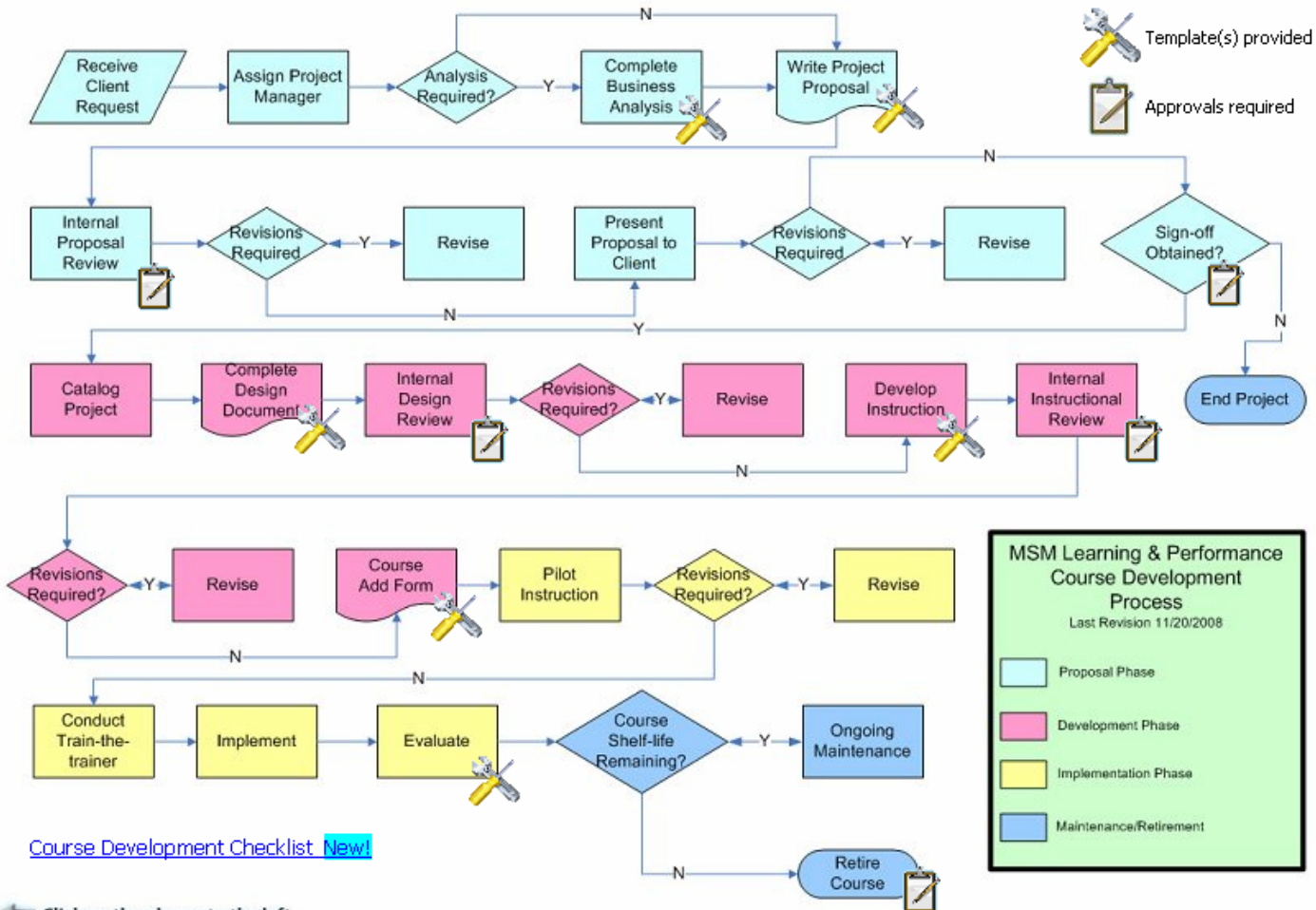
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[Course Development Checklist](#) [New!](#)

Click on the phases to the left to explore and access templates.

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Close

# Five steps to closing the sale...

1. Develop a learning strategy through business unit learning plans
2. Consolidate learning plans
3. Develop operational goals
4. Establish a governance process
5. Develop a learning architecture and standards

# Resources & Tools



## Organization Culture, Model and Five Step Process

- The High-Impact Learning Organization (Bersin & Associates, May 2008)
- Organizational Management Excellence (Bersin & Associates, Dec 2007) – Caterpillar Case Study
- The Bersin & Associates Learning Organization Scorecard®
- Learning Culture Self-Audit (Clawson; The Darden School of Business)

## Performance Improvement/Consulting

- The Six Disciplines of Breakthrough Learning (Wick, Pollock, et al., Fort Hill Co.)
- Training Ain't Performance (ASTD, 2004)
- Behavioral Engineering Model (Thomas Gilbert)

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