

# Learning See, Learning Do

BY JOSEPH TOTA

Imitation is indeed the sincerest form of flattery when it comes to learning leaders mimicking their line of business peers' success tactics to achieve operational excellence.



 **ON THE WEB**

Business and tech futurist Daniel Burrus discusses how blossoming technologies will bloom into big changes for the learning industry.

**[CLOmedia.com/LearningTech](http://CLOmedia.com/LearningTech)**

**E**ven when learning organizations have the best strategies, people and technologies to deliver business value, their initiatives often fall short on execution.

Other functional areas of the organization emphasize operational excellence and continuous improvement in how they deliver business solutions. Learning organizations must adopt the same mindset to ensure best practices are inherent in their culture and operations. That will help them to mature, deliver better solutions, improve quality, provide consistent and reliable service, and have more satisfied business stakeholders — all at a lower total cost of ownership.

Learning generally follows the same solution life cycle as other functional business areas in terms of product and service delivery — initiation, analysis, design and development, delivery, maintenance (Figure 1, p. 28).



In a learning organization, business stakeholders initiate service and product requests that are then prioritized and planned for strategy and execution. Analysis clarifies performance objectives and confirms that learners receive the correct intervention, or solution. Interventions are designed and developed in collaboration with subject-matter experts and then delivered to the learner population. Maintenance comes in via a sustainable learning plan.

Within this end-to-end process there are many subprocesses; it's the learning leader's job to optimize these subprocesses to deliver maximum value to the larger organization.

Wawa University — the learning function for convenience retail chain Wawa Inc., which operates 700 convenience retail stores — applies principles from Six Sigma, lean and continuous improvement to deliver greater business value. The starting point is defining the roles, responsibilities and processes that will enable the Wawa team to deliver consistent performance outcomes.

“For our L&D team to be successful, we had to build a foundation to deliver a consistent and effective learning experience for over 22,000 employees,” said Stefanie Sharpless, manager of Wawa University. “By having a documented and repeatable process for our core functions, our teams can continuously improve our operations by identifying areas where we can optimize. In most cases, we can pinpoint an area of the process where a breakdown occurs and fix it.”

Wawa University found that with a defined and repeatable process in place, metrics can be layered to measure efficiency, effectiveness and outcomes. The metrics help drive continuous improvement and provide a platform to measure what is working and what needs to be optimized, allowing Wawa, or any organization, to add business value.

The challenge to building a learning organization with operational excellence is figuring out where to start. While all process and subprocess areas should

be documented and continually improved, there are five areas where learning leaders can realize breakthrough improvement.

## 1. Project intake.

This initial interaction with business partners needs to be a defined process. Implementing a process — and in some cases, a business-facing technology — for request intake helps improve business partner relationships by ensuring that requests are validated and prioritized to deliver maximum business value.

In a mature learning organization, project intake becomes a planning initiative where leaders and key business stakeholders collaborate to conceptualize strategic or tactical projects. Building operational excellence in this area involves designing an intake process that meets business partners' needs while validating whether their aims could be achieved through a learning and performance support solution.

## 2. Strategy development.

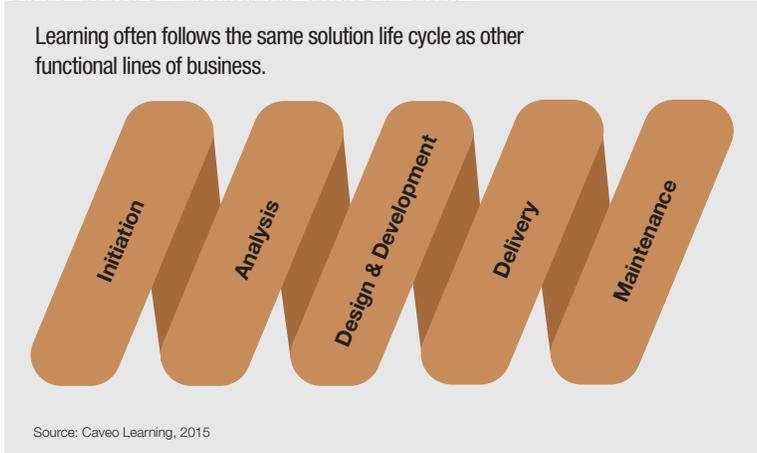
Building operational excellence around strategy requires a methodical and structured methodology that learning organizations can apply to any business need. Mature learning organizations that excel in this area have a documented strategy with defined outputs their teams can execute against. Business partners understand the importance of their active role in strategy development, and are aligned on the output they will receive, including how these outputs will meet their initiative's needs.

Learning leaders must ensure that essential components are included during strategy development. For starters, know stakeholders, and simplify strategy delivery based on the business partner's role in the organization. Other necessities for effective learning strategies include the following.

- **A business case:** Identify specific business objectives, how success will be measured and the anticipated effect on the organization. A business case is commonly missing in learning strategies. The key decision-makers need to understand how the strategy will help achieve business objectives; that means including learning key performance indicators. Successful learning strategies clearly articulate the business case and justify requested expenditures for the learning and performance initiatives. Budgets are often determined and approved based on the business case for an initiative and their relative alignment to the organizational strategy.

Jack Molloy, senior vice president of the North America market for Motorola Solutions Inc., said there will always be limits to what projects can be funded. Therefore, approvers need to consider business cases that stand out in terms of business impact and cost efficiency. “A key part of any successful organization is a strategy that includes consideration of

**FIGURE 1: THE LEARNING SOLUTION LIFE CYCLE**



thoughtful business cases that demonstrate consistent growth opportunities that can deliver results,” he said.

- **Key findings and recommendations:** Include informed recommendations for learning solutions, tailored to the organization’s culture and developed in collaboration with key stakeholders and subject-matter experts. Frame recommendations at a high level to help business partners and key stakeholders grasp end objectives and the strategy road map. An effective learning strategy is easily understandable by executives who don’t have a learning background, and it includes simple and straightforward recommendations.

- **Learning paths:** Role-based learning paths visualize the route for professional development that learners will travel. Helping business partners clearly understand the learning journey promotes buy-in for the overarching strategy and provides an opportunity for feedback. Many learning strategies are focused on courseware, neglecting other elements in the learning process such as leader support, mentoring, coaching, communication and performance-support solutions.

- **Enabling technologies:** Define the enabling technologies that will support the implementation, delivery and adoption of learning solutions, such as a learning management system, e-learning authoring tools, mobile devices, a social learning platform or

portals. It’s critical to clearly identify enabling technologies and how they will integrate into learning and performance solutions.

- **Measurement and evaluation plans:** This describes how learning and performance initiatives will be measured, evaluated and aligned to business objectives.

An effective learning strategy is easily understandable by executives who don’t have a learning background.

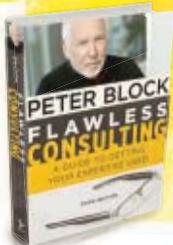
A learning evaluation plan is commonly overlooked, but it’s essential to identify what data will be collected, how and what learning will be evaluated, and who will receive the data.

- **Resource and budget plans:** A resource plan for the learning team and subject-matter experts is needed to design, develop and implement learning solutions. Resource scarcity is common in most learning organizations, so establish confidence in the learning pro-

**LEARNING** continued on page 48



**Peter Block’s Flawless Consulting workshops are the palettes that create impact.**



Every staff function seeks to work collaboratively to become a trusted business partner in an environment where they have influence without direct control. Fortunately, Designed Learning’s Flawless Consulting workshops, developed and enhanced by Peter Block, help change conversations with your internal clients to get your expertise fully used.

These powerful workshops are the brush strokes that create highly successful contributors in organizations. That is why over one million individuals around the world have benefitted from these workshops onsite at their locations.

Call us today at 1-866-770-2227 to bring the Flawless Consulting workshops to your location or visit us at [www.designedlearning.com](http://www.designedlearning.com)



**designedLearning**  
a Peter Block company

gram by clearly identifying personnel and budgetary needs. This will make it easier to secure resources and funding needed to implement the strategy.

- **Sustainable learning plans:** The process to maintain learning deliverables will be implemented after learning and performance solutions are delivered, but it needs to be established well before that point. Determine how learning deliverables will be maintained, who will have ownership after talent development events and how changes will be requested and implemented.

## Learning project intake, the initial interaction with business partners, needs to be a defined process.

- **Marketing and change management plans:** Outline a plan to mitigate the risk of organizational resistance to a learning initiative. A solid change-management plan identifies key sponsorship and leadership interventions, a change brand, stakeholder communications, organizational design and talent development considerations, and measurement of business readiness.

The more clearly each aspect of the strategy is defined and the more aligned the team is, the more efficiently the team will be able to execute.

### 3. Deliverable review and approval processes.

Generally, breakdowns in stakeholder relationships, poor quality, missed expectations and unrealized learning solution value occur during the design and development process. This process area is where learning teams collaborate with subject-matter experts to ensure learning solutions meet intended performance objectives and learners' needs as well as have the experts' approval. Building operational excellence in this area involves clear definition of roles, metrics, deliverable reviews, the approvals process, the quality assurance process and timelines.

### 4. Maintenance requests and planning.

Most learning organizations do not have a clearly defined process and service-level agreement with their business partners on how to provide maintenance updates. Maintenance resource costs are rarely budgeted for during the project planning stage. This causes relationship issues with business partners and ultimately requires learning organizations to develop solutions reactively, commonly shifting energy and budget from other initiatives.

Building operational excellence in this area requires three key assets to ensure expectations are met with business partners and resources are available to meet maintenance needs. They are:

- **Maintenance requests:** A process or business partner-facing technology that tracks maintenance requests, enabling learning to prioritize and assign resources.

- **Service level agreements:** Mutually agreed to by learning and business partners, these include how often and when updates to content will be provided, such as monthly, quarterly or as requested within 48 hours. People often think of these agreements as only being valuable externally; while they do not need to be as detailed or legally defensible, having internal service level agreements in place at the outset of any project will ensure alignment between all parties and provide a clear understanding of resource needs.

- **Resource planning:** Some resource allocation planning should be partially or fully dedicated to managing and executing maintenance requests. Resource planning should be an integral part of the initial project budget and learning strategy.

### 5. Methodology, toolkits and templates.

Organizations typically have tools and templates that individuals use on projects, but these may not be adopted as broader standards. Thus, many learning organizations either reinvent the wheel for each project or they have inconsistent solutions because individuals use their own tools rather than standardized departmental solutions. In addition to preventing redundancy, standardized solutions allow for improvements gleaned from one initiative to be applied universally.

Building operational excellence requires a documented methodology with toolkits and templates to deliver a consistent approach. Learning leaders should clearly define the methodology, tools and templates that are the department standard and make them easily accessible to their team members. Continuous improvement is enabling a feedback mechanism for team members to submit, contribute, provide feedback, rate and ultimately enhance the departmental standard. **CLO**

*Joseph Tota is a strategic learning partner at Caveo Learning, a learning consulting firm. To comment, email [editor@CLOmedia.com](mailto:editor@CLOmedia.com)*



#### DO YOU HAVE A COMPANY LEARNING ROADMAP?

Scitent's Linda Coogole has five elements to get your company on the right path.

**[CLOmedia.com/LearningRoadmap](http://CLOmedia.com/LearningRoadmap)**