Determining the Maturity Level Of Your Learning Organization

HOW ABOUT ADDING A NEW LEVEL TO THE KIRKPATRICK/PHILLIPS MODEL?

BY JOE DIDONATO

In the late 1980s, when I took over Oracle's Customer Education in the Americas, we had a very frank but strategic-level discussion about the organization that I was taking over. The opening scenario was that my predecessors hadn't really impacted our clients' ability to use our software effectively; and as a result, we had relegated our software to what we called "shelf-ware." And to make sure I understood the seriousness of my new role, I was told that it was because of Customer Education that we were about to lose the battle to Sybase, IBM, Informix and a host of other larger relational database players at the time. And, by the way, Joe, welcome to your new responsibility.

From that initial discussion, we formulated a wide-ranging strategy that had us focused on making our customers truly expert in the use of our software. My revenue targets were raised from less than 1 percent of total revenues to 15 percent of total revenues. That was determined to be the proper level of marketplace training that would force us into a market growth mode. The model itself wasn't too complicated to comprehend (see Figure 1), but in retrospect, I've always felt that the Kirkpatrick scenario of maturity levels fell short of truly describing this strategic use of an education organization. And that includes the great addition that Jack Phillips made to the original Kirkpatrick Model.

So with that quick story as a preamble, let's take a look at how a learning and development organization might mature. One of the key models that I like shows learning maturity as a progression through four iterations in their growth:

>> Traditional Training Partner (Level 1 of maturity)
>> Tactical Training Partner (Level 2 of maturity)
>> Valued Learning Partner (Level 3 of maturity)
>> Strategic Learning Partner (Level 4 of maturity)

Figure 1.

To begin describing these stages of evolution, I think we need to begin with a common reference point, the Kirkpatrick Model. That maturity model asks four fundamental questions:

>> Level 1 (Reaction): "Did the learners like the training program?"
>> Level 2 (Learning): "Did the learners learn the content?"
>> Level 3 (Behavior Change): "Did the learners deploy what they learned on the job?"
>> Level 4 (Results): "Did the implementation of the training program impact business results?"

Jack Phillips came along and said that's still not good enough and added a fifth level called "Return on Investment" (ROI) to the Kirkpatrick model:

>> Level 5 (Return on Investment): "Did the training investment pay off?"

The combined model then became known as the Kirkpatrick/Phillips Model, and is still one of the most widely used models when it comes to describing the level of maturity of the learning and development organization.

To me, we're still not there — nor do these five levels adequately describe my opening challenge in
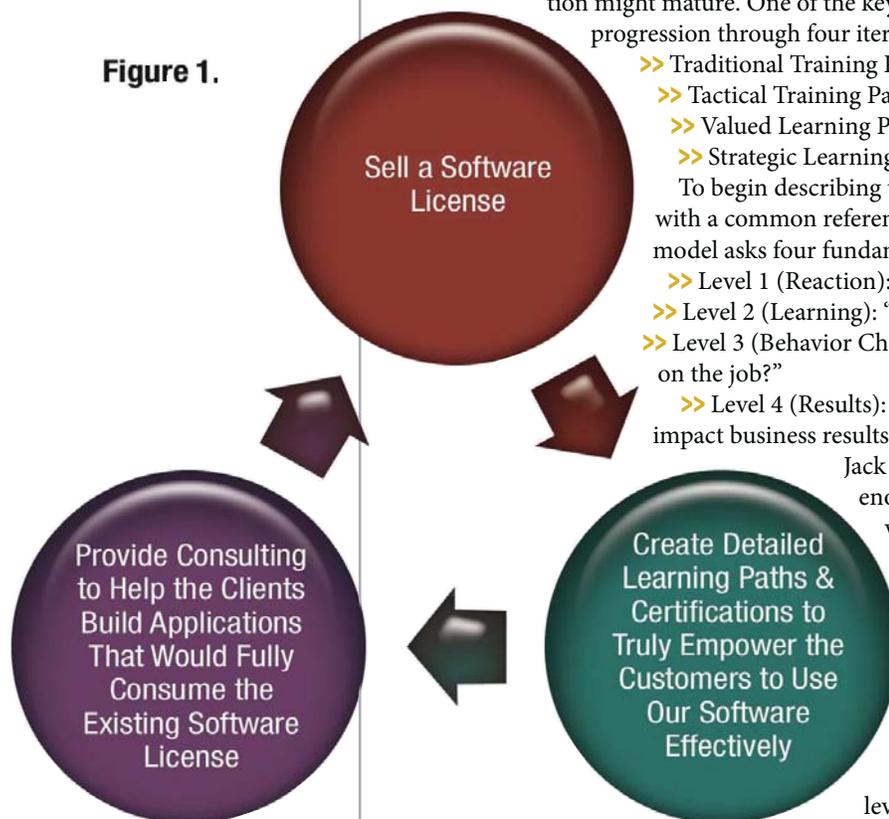
my role at Oracle. In my opinion, the sooner we re-focus our efforts from counting course launches or measuring success in terms of "smiley sheets" and begin moving toward the notion of employee, partner and customer performance results, the better equipped we will be to achieving the status of "strategic business partner."

What I would like to propose is that we begin to think in terms of the level of partnerships with which I began this article, and perhaps begin to formulate a sixth level to the Kirkpatrick/Phillips model.

>> Level 6 (Achievement of Strategic Imperatives): "Did the learning organization impact the strategic initiatives of the company?"

Of course, we'll need to describe that level in terms that we can measure, but that's getting beyond the scope of this initial article. What I want to do is to get us thinking about this as a missing but valid level of maturity, and the necessary outcome of true alignment with the strategic initiatives of the company.

What I will try to do now is to associate the type of activities that might be typical at each partnership level. You can see a simple overview of the types of activities that might occur at each level in the (overly) simplified table shown in Figure 2.

If we start at the "traditional training partner" level, you can see that the type of training offered is in the early starting phases: Levels 1 and 2. More than likely, classroom training was necessitated by a compliance requirement, or possibly a new company initiative, like changing the company's back-office system, or implementing a salesforce tracking application.

Learning & Development Maturity Grid (Figure 2)

Learning & Development Maturity Indicator	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Partnership Level
Classroom Courses Deployed	X	X	X	X	X	X	
E-learning Courses Deployed		X	X	X	X	X	Traditional Training Partner
Learning Management System Deployed			X	X	X	X	
Mandatory Training & Tracking Deployed			X	X	X	X	
Certifications Utilized				X	X	X	
Talent Management Systems Utilized				X	X	X	
E-learning Development Tools Utilized				X	X	X	Tactical Training Partner
Mobile Learning Utilized				X	X	X	
Measurement of Learning Events Occurs				X	X	X	
Learning Best Practices Developed					X	X	
Social Learning/Collaboration Networks Developed					X	X	Valued Learning Partner
Embedded Training in Apps Developed					X	X	
Expert Directories Developed					X	X	
Learning ROIs Developed						X	
Customer/Partner Training Deployed						X	
Business Financial Impact Determined						X	Strategic Learning Partner
Business Strategy & Outcomes Linked to L&D Activities						X	
Business Culture Strategies Linked to L&D Activities						X	

In Level 3, a decision is made that an ongoing training function is needed, and an investment is made in a rudimentary learning or talent management system (LMS/TMS). But it's not until Level 4, when we start to expand our organization's reach that we start to move into the realm of a "Tactical Training Partner." More formal measurements of the department's utilization and learner satisfaction begin to appear, and we start to find ways to move some of the training out of the classroom and into the learner's hands.

It's at Level 5 where we cross the threshold from a "Tactical Training Partner," to a "Valued Learning Partner." We begin to discover and document best practices, deploy social networks to enable collaboration and informal training across the enterprise, embed training into our applications to move learning into the workplace, and provide ways of mentoring or sharing an expert's knowledge across the entire enterprise.

And finally, we have arrived at the proposed sixth level, which is where we begin to truly align with and impact the enterprise's strategies. At this level, more formal approaches to ROI are developed and vetted, customer and partner learning goals are defined to augment the enterprise's missions and goals, and a very formal linking of top level strategies to the learning and development team's goals are mapped and measured. It is at that point, in my mind, where we become a "Strategic Learning Partner."

As an example: At this level, enterprise revenue goals will formally cascade down into the learning department's revenue targets, which are then further translated into regional revenue targets; curriculum development objectives in support of that activity are then defined and assigned; classroom and virtual platform needs to support that level of activity will be determined by the technical team; and so forth, throughout the department. Every person in the organization should be able to clearly see the relationship between what he or she is doing, and how individual efforts impact the company's overall strategy.

Perhaps it's the point where management by objectives (MBO) or similar goals kick in that allows us to measure our individual and departmental achievements against the company's strategy — whether that be revenue, market penetration, cultural shifts, time to market, or mission readiness.

And with that final thought, I will stop and turn to my colleagues in the field to challenge and criticize, or further enhance the evidence we should strive for that would validate our organization as a "Strategic Learning Partner." Let me know your thoughts at jdidonato@2elearning.com.

> **L&D should re-focus efforts from counting courses to measuring performance results…to achieve 'strategic business partner' status**