



# BEFORE MAKING A PLAN... HAVE A STRATEGY

Think *learning strategy* not just *learning*, advises Matthew Fletcher.

**2014** is drawing to a close. The party season is well underway. It's cold...it's dark... it's wet. The Christmas party is booked and the arguments over who's more entitled to take three weeks' holiday over the festive period have been settled one way or another. You may find your attention turning to the question: "What am I going to do next year?"

Now, I don't mean this in regard to unrealistic New Year's resolutions about being a much nicer person, eating fewer Jaffa Cakes or finally getting out that bike you bought last year. I mean this in regard to your organisation's learning plans for 2015.

At Atticmedia we're big believers in (and architects of) learning strategies and we work with a number of our clients to help them formulate or improve their learning strategy. Here's a summary of our recommendations:

*What is a learning strategy and why do you need one?* Before you embark on a learning strategy, it makes a lot of sense to know what one is. A learning **strategy comes first**, and should inform all your learning plans and activities.

- A good learning strategy should answer very clearly the **why** of all your learning goals. Why are we doing this and why will it help the organisation?
- It should start **tackling the 'what'** – in terms of "*What changes/improvements do we want to achieve?*" but only in top line terms, not drilling down to particular learning outcomes (that should come later, or else you'll get bogged down). It is essentially "*What are people not doing that they should be doing?*" Or indeed "*What should people not be doing?*" Rather than approaching the particular question of

which specific knowledge or skills gaps you think there are.

- If you find you're getting bogged down, try taking a step back, and then another step back, and look at the really essential challenges and opportunities your organisation is facing. Look at the big picture stuff for the medium- and long-term and the really important and urgent stuff in the short term. You can't solve absolutely everything so agreeing on priorities is important.

- And don't forget the 'who' – "*Who are we targeting?*" Take a step back again and think empathetically and honestly about your learners (there may well be a number of different types of learner in which case you'll need to segment them). What insights do you have into your audience? If this is an awkward question then you need to go and gather some better knowledge about them. "*What is going to actually work with our audiences?*"

These recommendations should clarify why you need a **Learning Strategy** before you start planning and carrying out learning activities or creating resources. You need to go through the semi-formal process of thinking these big questions through and agreeing on the answers; otherwise how will you know if your plan is a good one? You need something to measure the plan against, and then something to measure the success of the learning against.

You should also find that it's a lot easier to make decisions on more of the details once you've got a firm and agreed overall strategy in place. It's no longer subjective decision making, it's more objectively about what activities are going to deliver against this strategy.

You can now start your **Learning Plan**, perhaps for the coming year or for however long your business cycle works. A Learning Plan will start to fill in the details on the 'what' and answer the 'when' and the 'how'. So, it's an equally important process to go through. Let's look at a few areas that should be covered in a good learning strategy:

### VISION AND OBJECTIVES

This is taking the overall business/organisational vision and translating it into a business need and a business case for some learning to go on. Learning is great in its own right, but most organisations aren't there primarily for people who work within them to learn. However, it is almost always the case that having staff learning and developing will be of significant benefit to the business. You need to articulate this argument in a

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robust way, in the context of your organisation. Answer the 'why' as if you need to persuade the most 'anti-learning' of people (they do exist).

### AUDIENCE

Never forget that everything you do will be experienced by real people. If it doesn't 'work' with your audience then it won't be a success. It's very easy to get sidetracked by the latest trends in learning and learning technology (*we ought to try some of this, or be doing more of that*) but the test should always be whether it will actually work with your audience. How busy are they? How motivated are they? What technology do they have? How can you best blend your learning into their everyday schedule rather than expect them to bend their schedule to fit with your learning delivery?

One of the most common reasons I've heard for people leaving a job is: "I wasn't learning anything, I wasn't developing". Almost everyone wants to learn and enjoys learning.

But I also know there are a lot of people who roll their eyes and drag their feet when it comes to more learning requirements and mandatory courses and modules they have to take. One of the challenges we all have to meet as learning professionals is to make learning as integrated as possible in people's day-to-day lives and consumption habits. And technology provides great opportunities for this if done right.

### STAKEHOLDERS

Don't forget stakeholders. They are an important audience too. Your plans are certainly going to need to work with the involvement that your stakeholders will want/need. So, assess your stakeholders and make sure this feeds into your approach too.

### APPROACH

Outline some of the 'what' – but keep it high level. Articulate the changes in behaviour, attitudes, skills and knowledge that you need to achieve. Weigh up the different options in terms of approach (often referred to as an assessment of 'strategic options'), but again, don't get bogged down in details or specific delivery mechanisms at this stage.

You do need to consider practical factors such as budget, timescales, resources and logistics. But you don't need to go into fine detail or start creating detailed project plans or risk logs and so on.

### EVALUATE

The learning strategy is a great opportunity to agree a set of criteria and processes for evaluation. Once the learning has been planned, and while it's being delivered, how are you going to evaluate it against the aims and objectives of this learning strategy? Different organisations do this in different ways and it's often something we help them think through and implement.

### CONCISE, JOINED-UP AND COMMUNICATED

A final piece of advice would be to make sure your strategy isn't just a long list of disparate things you need to achieve. Try to practice a bit of essentialism here – the big theory being pushed right now by Greg McKeown in his popular book *Essentialism. The disciplined pursuit of less.*

Focus on the really important few things that will make the most difference to your organisation (once these are achieved or at least under control you can always come back later and create a strategy for some of the other stuff).

A concise, joined-up strategy that clearly runs through all (or at least most) of your learning activities is also a real strength when it comes to communicating this strategy to everyone. It is important that people understand the strategy behind the learning they are being asked to spend time on, and it's equally important that the organisation's leaders understand what the budgets are going towards. So make sure you communicate the strategy effectively to your audiences.

Once you're done with this, then – and only then – should you start fleshing out the detailed plans for future learning activities. Keep checking as you go that this is meeting the overall strategy. You probably deserve that Jaffa Cake now.

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