

TOOLKIT

SHARPENING THE SAW: Are You Prepared to Develop a Learning Strategy?

atd|FORUM

Connect. Collaborate. Share.

Introduction

This ATD toolkit has been created by the ATD Forum, an organizational membership consortium that connects, collaborates, and shares to leverage learning and business practices within the group. Through this peer network, we've found that regardless of industries, talent developers face many of the same challenges. However, the perspective on these differs. Understanding how others frame and address difficult situations can expand your point of view and may even enable you to reframe your own issue.

We recognize there are myriad ways to approach problems using various tools, techniques, and templates. This was aptly demonstrated in the Forum's book, *[Leading the Learning Function: Tools and Techniques for Organizational Impact](#)*.

The purpose of these Forum-developed toolkits is to create awareness around multiple options available for thinking deeper and wider about the topic. The toolkits are not intended to be step-by-step, formulated directions for a solution. While some of the tools, techniques, and templates are from the Forum's book, the goal is to complement those assets, expand the repertoire, and support all talent leaders as they improve at solving their specific business challenges.

We enter the learning profession because we like to design, develop, and deliver learning experiences to help others maximize their potential. Our department is one small area within the organizational system.



However, if we stay, excel, and move up the ranks, our role can evolve into a senior leadership position. In this role, we can help other leaders work on the organizational system to build a competitive advantage for the company.

Renowned management expert W. Edwards Deming highlights the role of leadership as one that ensures others can work effectively and efficiently within the system. This leadership work includes providing guidelines and direction for your employees to complete their daily work successfully. Creating strategies—such as an overarching business strategy, a leadership strategy, a communication strategy, or a learning strategy—are examples of this type of support.

The following templates, tools, and techniques for developing a learning strategy are based on section 1 of [Leading the Learning Function](#), and methods employed are by ATD Forum member [Trane Technologies](#) and other members.



What Is a Learning Strategy? Why Is It Important?

Frequently, the methods or approaches learners use to optimize how they obtain and store information and concepts are called learning strategies. For example, some define learning strategies as reading the assigned chapters prior to a lecture, organizing and designing a personal guide of the study materials, and spacing reviews and practice sessions over time. For the sake of this document, our operational definition of a learning strategy is a plan of action or framework to optimize employee performance through learning while being aligned with the business or operational strategy. So, like an organizational strategy, a learning strategy is the high-level plan of action or framework that sets the direction for the expected results.

Developing a learning strategy that is grounded in the performance needs of the organization is difficult. It takes skills, time, hard work, commitment, and constant monitoring. But there are huge benefits when done right. A learning strategy ensures alignment with the organization and helps everyone grow together to accomplish the results needed for competitive advantage. It should clearly show the role of the learning function and how to measure success. Thus, a learning strategy helps establish priorities and keeps the learning team and organization focused on what is important versus what is urgent. It also makes the entire organization cognizant of the contributions of the learning function to the success of the business objectives and goals.



While learning leaders might be inundated with responding to daily demands and reacting to a variety of requests within the broad talent and learning arenas, their role includes working with other leaders to ensure organizational impact, which results in competitive advantage. The capabilities required to accomplish this comprise one-third of the [Talent Development Capability Model](#) and fall under the Impacting Organizational Capability domain.

Talent strategy and management, one of the capabilities within the model, requires most of the other capabilities—skill adjacencies—that fall under the Impacting Organizational Capability domain, including business insights, consulting and business partnering, organizational development and culture, performance improvement, change management, data and analytics, and future readiness.

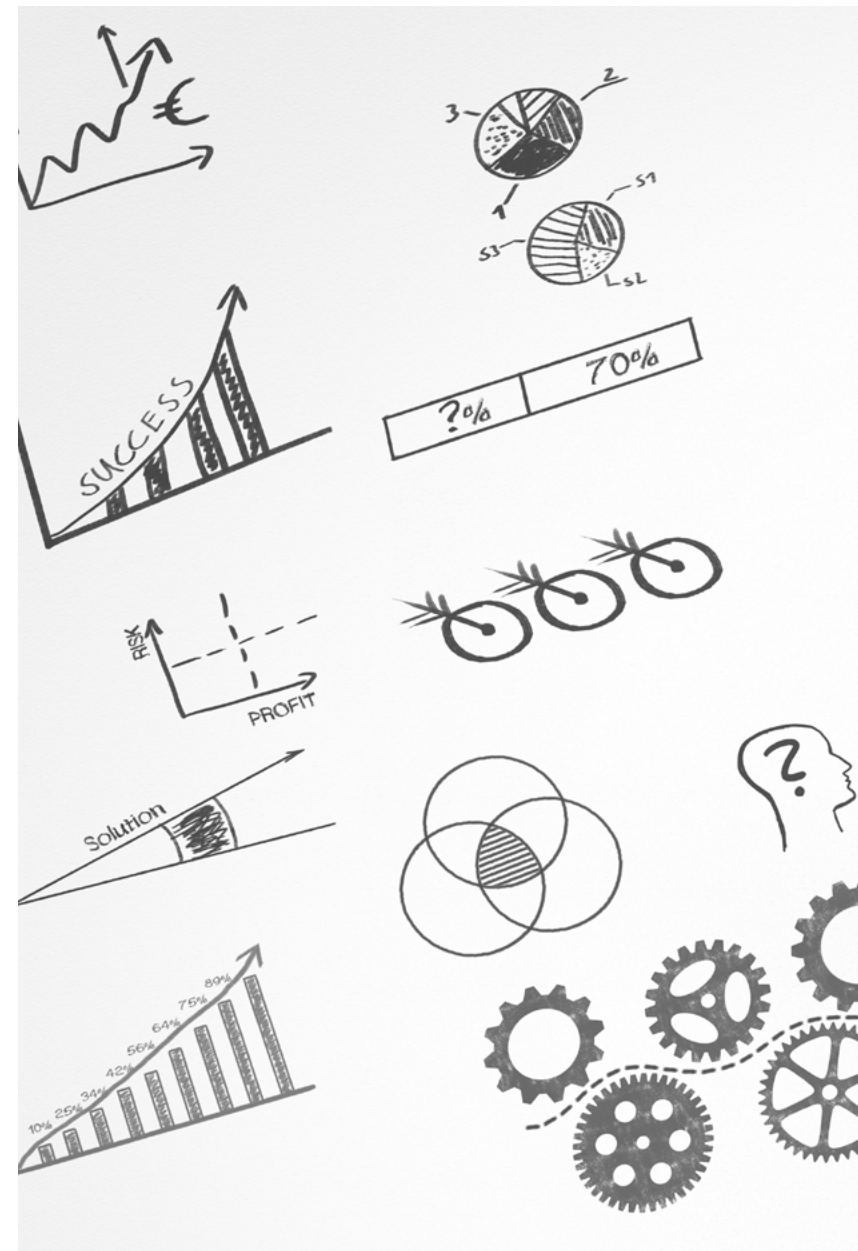
Developing a strategy is not just about being a visionary, gathering your team, and sharing your aspirational dreams. Nor is it just about having your team brainstorm and document where they want the organization to be in a year or 18 months. In *Playing to Win: How Strategy Really Works*, Alan G. Lafley and Roger Martin define strategy in terms of making integrated choices as a response to challenges and conditions. The two critical choices include “where you will play?” and “how will you win?” Making these choices requires viewing and understanding the organization as a whole ecosystem and clarifying people’s roles to produce the desired results. Additionally, the two go together and must be addressed sequentially.

5 Find more tools at td.org/MemberTools.



To understand how your business operates and grows, it is important to develop **business acumen**. According to Kevin Cope in *Seeing the Big Picture: Business Acumen to Build Your Credibility, Career, and Company*, business acumen requires knowledge of five key business drivers and how they are linked together. These drivers—cash, profit, assets, growth, and people—are affected by the business environment and external factors.

According to Cope, the people category takes center stage within these five drivers. The people category includes the roles of all players, including employees, customers, stakeholders, governance groups, and competitors. To ensure that the people are upskilled to meet tomorrow's challenges, learning leaders must understand and address these connections and interactions.



Strategy Development for the Learning Function

Just like a learning experience, there is work before, during, and after the learning strategy event. Planning and preparation prior to making the choices during the actual “strategy development” process is essential. Execution, feedback, communication, and continual improvements after the development are critical.

The strategy process can be divided into five phases:

1. **Project planning.** Like all projects, you start with a project plan. You need to know the players, stakeholders, goals, and resources. One of the best ways to have everything organized is with a project charter. This lays out who will do what and when it is due and allows everyone to have a common understanding.
2. **Opportunity assessments.** This is where a major part of the effort and time will be spent. This phase includes defining the current state, and documenting all data, researching trends, and gathering both internal and external feedback and opportunities.
3. **Strategy development.** Various strategy models are available. The recommendation is that one framework or model be used throughout the organization. As with other learning initiatives, the strategy needs to be written in business language.
4. **Implementation and launching considerations.** Reviewing the design with the [governance](#) team and all senior executives is imperative. This process provides not only excellent feedback



and input, but it also secures buy-in, especially if new investments are needed. Based on their input, developing a launch ramp with timelines, milestones, communication plans, and performance metrics can be helpful.

5. **Execution and continuous improvement.** A strategy is a dynamic, living document. It is not to be developed and then put on a shelf for the next off-site. It needs to guide all decisions and be frequently reviewed for updates, changes, and additions.

Member Case Study

*Trane Technologies:
Gaining Personal Experience
With What We Teach Others*

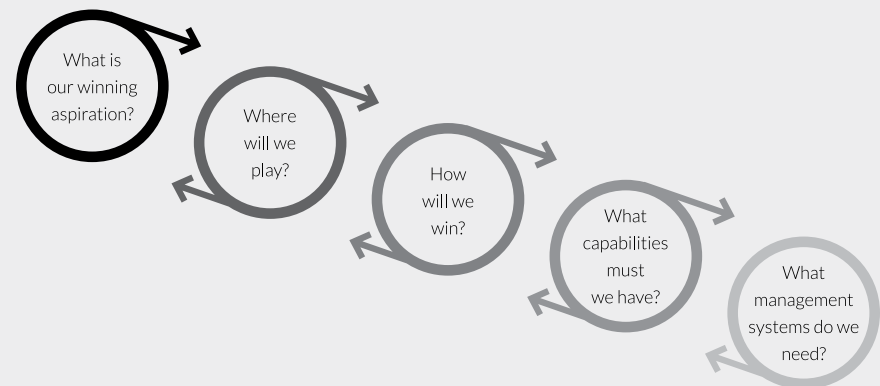


Many of the concepts and tools in this toolkit came from ATD Forum member [Trane Technologies](#). They are documented in [Leading the Learning Function](#) and have been shared on ATD Forum webinars. At the time that the case study was written, the company was named Ingersoll Rand.

In her chapter of *Leading the Learning Function*, “Syncing Up for Synergy,” Lisa Gary, the CLO, shares the story of how she led her team through a structured process to refresh the learning strategy to influence the organization. Two of the guiding principles for the project were clarity on the understanding of the strategy and using the same strategy development model used by the executives across all business levels—Lafley and Martin’s strategy choice model.

For Gary and her team, strategy is not a list of goals and generic pursuits like operational excellence. It is the integrated choices

The Strategy Choice Cascade



Source: Lafley, A.G., and R. Martin. 2013. *Playing to Win: How Strategy Really Works*. Boston, MA: Harvard Business Review Press.

they make to respond to important challenges. For her, the why and how are the most important considerations.

Because of the time and commitment involved, Gary developed an overarching project plan and worked with a small core team and the periodic engagement of the entire global team. They divided the project into three phases: opportunity assessment, strategy definition, and implementation considerations.

As part of the “opportunity assessment,” the team started with brainstorming a list of questions to push their thought process. Then they used several methods to better understand the current state of their learning function and to scan the external environment for future-oriented trends and practices.

The tables Internal Data Gathering to Better Understand the Currently State and External Data Gathering to Better Understand Practices of Other and Future Trends contain the details of some of these actions.

Internal Data Gathering to Better Understand the Current State

Actions	Comments and Notes
Generated and tested hypotheses related to the current and future state	These included negative assumptions such as “our company would be better served with an outsourced enterprise learning function.” All assumptions had to be proved or disproved with data. If no data was available, they were dropped.
Conducted interviews with all the senior executives	The same set of 21 questions (see sidebar on page 15) were asked of every senior executive interviewed. All comments were captured, and from the compiled list, insights were documented.
Documented the current state in terms of performance metrics	The team had been gathering and analyzing data for several years. All of this information was brought into the conversations.
Assessment using the Bersin High-Impact Learning Organization assessment	Bersin & Associates’ High-Impact Learning Organization Assessment is available to Bersin’s members. This was one of the assessments the Trane Technologies team was able to use to learn more about their current state.

External data gathering to better understand practices of others and future trends

Actions	Comments and Notes
Conduct external research using a curated literature review process with the entire global learning team	The Trane Technologies team curated about 100 research articles. They involved the entire global team and divided the larger team into smaller review groups. Each of these subgroups reviewed and captured data on seven to 10 articles. The consensus discussion was captured, insights were recorded, and all information was shared with the entire team. For each article, the teams who read it collectively documented their insights using the following captions: <ul style="list-style-type: none"> ▪ What are the insights? ▪ Why is this important? What are the implications? ▪ What actions do we take?
Conduct external benchmarking research using a membership-based consortium	As a member of the ATD Forum, a membership consortium enabling connecting, collaborating, and sharing to leverage the collective capabilities of the other members, Trane Technologies developed a survey to find out what other members were doing. From the survey, they had deep conversations with some of the members to gain additional insights. This led to two major efforts. First, one member spoke at the strategy session via video conference call. Second, another member engaged and participated as an “outside voice” in the strategy offsite.

Making It Real for Execution and the Team

Getting feedback and incorporating it was not the end of the refresh. Three additional actions promoted execution and continuous improvement:

1. A member of the team developed a visual summary graphic called a placemat. This was printed and given to every member




of the learning team to post on their wall to ensure the strategy was front and center as they executed daily work.

2. They documented the entire process in a 10-minute video as a reminder of the work they did and to create an audit trail.
3. Because their strategy is a living, dynamic framework, they continue to meet every quarter to review, update, discuss, and level-set.




Trane Technologies University Strategy

Delivering on Enterprise Initiatives • Leader Transitions • Strategic Capabilities




LEARNING IN THE FLOW OF WORK

-  Microlearning solutions designed for greater business agility
-  On-demand learning resources available at employee point of need
-  Candid feedback and coaching culture

SIMPLIFICATION

-  Increased business connection leveraged through enterprise and strategic business unit learning leaders council
-  Streamlined and enhanced online learner experience
-  Data-driven methodology with strategic business unit and function annual learning plans

MODERNIZE FORMAL LEARNING

-  Increased employee performance through social collaboration and post-learning “stickiness”
-  Spaced learning with online learning ecosystems
-  Maximized virtual delivery



Templates and Tools for Assessing Opportunities

Abraham Lincoln is quoted as saying, “Give me six hours to chop down a tree, and I will spend the first four sharpening the ax.” In light of this guidance, the primary focus of this toolkit is to provide suggestions and ideas for the opportunity assessment phase of the strategy development process.

Assessing your current state and discovering opportunities for improvement is an attempt to improve your outcomes and a scientific investigation of your own capacity to understand your business. The goals are to identify what is currently wrong with the products or services and how they can be improved. You want to understand trends and options for the future so you can take advantage of opportunities and stay ahead of the competition.

1. Getting Started—Tools for a General Overview

There are many business tools and frameworks that can help deepen your understanding of the organization’s current state, business value, and opportunity. Two examples are the SWOT tool and Business Model Canvas.



► The SWOT:

The SWOT (strengths, weaknesses, opportunities, and threats) tool is an analytical technique that enables the user to gain an awareness of the organization's current internal capability and to assess external forces, which can positively or negatively affect the organization in a desired end state.

Strengths: Capture extensive amounts of data related to a variety of learning activities	Weaknesses: The technologies employed in the learning space are old and clunky
Opportunities: Integrating and supporting learning solutions using technologies such as aggregators, collaboration platforms, and apps	Threats: The current fast-paced changes in the area of regulations and the economy affect the needs of the customers

The SWOT tool is important because it is an objective analysis of current factors, systems, processes, products, and services in the organization.

Completing the SWOT evaluation is a collaborative process during which all the organization's employees can contribute. Large groups can use a digital survey, and small groups can use sticky notes on a poster. The responses to the four questions should be backed by data and trackable to a source:

1. What are the current **strengths** of the organization (what are its internal successes)?
2. What are the current **weaknesses** of the organization (what are its major challenges)?



3. What are current and future external **opportunities** that exist, including trends and changes in technologies, policies, economics, demographics, and so on, that can affect the organization? Look at the strengths to see if these open any opportunities. Alternatively, look at weaknesses and determine if eliminating them could open new opportunities to be competitive.
4. What are the current and future **threats** that can affect the organization, including competition from others and the trends and changes listed in the third step?

Because each of these questions will result in a list, the lists may need to be grouped into categories using tools such as [affinity clustering](#) and then sorted by priority or impact.

The SWOT tool can be used at the organizational, departmental, or team level or anywhere in between. It is important to be clear on the intended level as well as the desired end state. While the SWOT tool is useful to use in conjunction with other tools at the strategic level, it is a stand-alone tool that can be used as part of any analysis, thus a “go-to” tool for any leader.

► The Business Model Canvas:

The Business Model Canvas is another tool for understanding how the business unit creates value for the organization. Created by [Alex Osterwalder](#) and first published in *Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers*, it is a one-page template for summarizing or “painting” your business model using nine essential business drivers: key partners, key activities, key resources, value provided, customers, customer relationships, channels, costs, and revenue. Learning leaders may find it a useful and easy tool for seeing the learning function as a supportive business serving the organization. While there are many other templates available online for downloading, several collaborative apps have templates for virtual teams.

An Organization's Business Model (Business Model Canvas)				
Key Partners The network that enables the business model to be effective	Key Activities (including services) <ul style="list-style-type: none"> • Making products • Problem solving • Sales (including promotions) • Admin work 	Value Provided <ul style="list-style-type: none"> • Convenience • Price • Design • Cost reduction • Risk reduction 	Customer Relationships <ul style="list-style-type: none"> • Personal • Automated • Self-service 	Customers <ul style="list-style-type: none"> • Reason to exist
	Key Resources <ul style="list-style-type: none"> • People • Physical (e.g., land and buildings) • Intellectual (e.g., brands and copyrights) 		Channels <ul style="list-style-type: none"> • Enable awareness • Purchase • Support 	
Costs Related to acquiring resources, performing key activities, and working with partners			Revenue <ul style="list-style-type: none"> • Sales • Leases • Rents • Usage fees • Subscriptions 	

2. Understanding Your Position: Internal Assessments

A rule of thumb for gathering data and assessing the current state of your offerings is to start with all the data that is currently available. One way to do this is to brainstorm with the entire learning team and make a checklist. While some data is obvious, there might be other forms of information that are more subtle.

► Documenting the Current State in Terms of Performance Metrics:

For learning functions, there are myriad ways to gather data, but the critical thing is that the strategy team have access to all possible data for the last few years and projections for the future. A starting place for metrics is to consider the [ATD's annual State of the Industry](#) report and the categories it measures:

▪ *Efficiencies and Expenditures*

- Direct expenditures per employee
- Learning hours used per employee
- Direct expenditure as a percentage of payroll
- Direct expenditure as a percentage of revenue
- Percentage of expenditure for tuition reimbursement
- Percentage of expenditure for external services
- Employees per L&D staff member
- Learning hours used per L&D staff member
- Learning hours available per L&D staff member
- Cost per learning hour used
- Cost per learning hour available

▪ **Content Distribution and Delivery Methods**

- Average percentage of learning content by content area
- Learning hours available by various delivery methods
- Instructor-led delivery methods
- Learning hours available and used by technology delivery
- Learning hours of formal learning used via technology-based methods
- Learning hours of formal learning used via all delivery methods

➤ **Testing Hypotheses:**

This activity is another brainstorming session. What are all the hypotheses the team can imagine, including the elimination of the learning function? List them and then either prove or disprove them with data. If there is no data, mark them off the list.

➤ **Conducting Interviews With All Senior Business Executives:**

Develop a list of questions to ask all senior executives. Some of the questions should be general, while others should

Interview Questions:

Questions for interviews with senior executives will need to be customized for every organization. However, there are some general ones that every organization can ask in terms of how the leader perceives the effectiveness and efficiencies of the services offered by the learning function, for example: What is working well? What needs to change? What is not working? And what is missing?

- What external trends is the organization facing?
- What skills and capabilities will be required for employees and managers that we may not have today but will enable us to move forward successfully?
- What business value or value proposition does the learning function bring to the organization today?
- Looking into the next three to five years, what additional value would you like to see the learning function delivering? Conversely, what should we (if anything) stop doing?
- If your business or team has a learning need that cannot be met by the learning function today, where do you go to fulfill that need?
- What would you recommend the learning function do to gain a more competitive advantage in our internal and external marketplace?
- Regarding leadership development, what is working well and what needs to be improved?
- What (if anything) should we do differently with our high-potential cohort leadership development programs?
- Regarding strategic capabilities, what is working well and what needs to be improved?

be more specific to certain programs and processes. Using standard interviewing protocols, ask these questions and capture the responses:

- What is working?
- What is not working?
- What should we be doing differently?
- What should we keep in the current portfolio?
- What should we eliminate?
- What should we add?

➤ **Professional Communities and Assessments:**

Many learning functions belong to membership groups or consortiums' that provide vetted learning communities and networks (for example, the ATD Forum or Josh Bersin's group). Other options include applying for awards such as ATD's BEST Awards or CLO's Learning Elite. While these take time, and usually there is a fee, the feedback is outstanding and extremely helpful.

Interview Questions continued

- What should the learning function's top three priorities be for the next three to five years?
- What are your measures of success for the learning function's products and services?
- What is your perspective on our leaders being in the classroom to share their expertise with our talent?
- What amount of time would you want your senior leaders to give to this endeavor?
- What are the upsides or downsides of a pay-per-seat model?
- Would you allocate budget dollars and pay per seat for your employees to attend the learning function's programs?
- As for benchmark data, what might the learning function learn from you if you were to reflect on your past experiences with other high-performing enterprise learning functions?
- What else would you like to share with us that we did not ask?
- What effective learning solutions and processes do you see from your strategic business unit's technical and product training teams?
- What inefficiencies do you see?
- What overlap between the learning content or audiences and the learning function's scope do you see?
- What external trends is the organization facing?

*Source: Hall, M.J., and L. Patel. 2020. *Leading the Learning Function: Tools and Techniques for Organizational Impact*. Alexandria, VA: ATD Press.*

3. Understanding the Competition: External Opportunities

One of the best ways to assess your internal capability is to benchmark other organizations. Using a survey or quick poll, especially if you belong to a consortium or network, is much faster and easier than visiting in person. Based on information gleaned from the survey, you can determine which companies

you might want to interview for deep discussions. From the interviews, you then might conduct an in-person visit to learn even more details.

In the table Questions to Consider for Benchmarking Other Learning Functions, there are some questions to consider for the initial survey. Including options for the responses that might increase the participation level (not included):

Questions to Consider for Benchmarking Other Learning Functions

Possible Questions	Comments and Thoughts on the Value of This Question
Which employees does your learning organization primarily serve?	
Where are the employees you primarily service located?	
Does your organization use an LMS?	
How does your organization curate your content?	
Which of the following technologies and delivery models are used for training?	
What is your facilitation model?	
Which department in the organization do the internal facilitators report to (training organization, business units, etc.)?	
Does your organization support user-generated content and do you monitor it? If so, how?	
Where is your content designed?	
How is your organization's learning structure/model organized?	
How does your organization fund training?	

► **External Research Using a Curated Literature Review Process:**

Information on practices in the learning space from a wide variety of industries builds a database of trends and a foundation for next practices. One way to do this is to conduct a literature search. This might start with library and online searches. However, research is like detective work. While the initial review provides some fact-based information, it also is a way to collect new information and identify expert thought leaders and organizations.

One simple tool for capturing all the data is using an Excel spreadsheet as a repository and providing the format and a sample so there is consistency in the write-up from different team members.

Headings such as this sample are suggested:

Title	Author	Summary Statement	Trends and Innovations	Group Rating	Source	Date	Notes

► **External Research Using Vendors:**

There are organizations that will conduct benchmarking research for you, especially if you just want to know the current trends. Some of these are membership groups, and others are pay as you purchase.



Learning Strategy as a Set of Choices

Author Lewis Carroll wrote, “If you don’t know where you are going, any road will get you there.” Not knowing the role your learning function will play in enabling your organization to solve today’s problems effectively and build new skills to meet the challenges of a changing tomorrow will leave you wasting time and resources. Knowing the role you play in the strategic choices you make will help your learning team and your organization set expectations for everyone to meet.

But you cannot stop with just knowing the role of the learning function. Using a variety of tools and techniques to understand your playing field, the trends of the profession, and the conditions affecting the industry will give you an actionable game plan to win in the space you are playing. This game plan needs to be linked to the higher aspirations of the larger system (for example, aligned and integrated with the objectives and desired results of the organization). To be executable, it must be grounded in management systems, and most importantly, the employees must have the capabilities to make it work.

According to Lafley and Martin, strategy is not a long planning document; it is a set of interrelated and powerful choices that position the organization to win. These choices must be informed by extensive data about your current processes, results, and impact



as well as what is around the corner in terms of the future. In their book, they state, “Choosing what to do and what not to do—in conditions that can be ambiguous, heavy with consequences, and changing constantly—is the definition of strategy.”

Author and performance coach Brendon Burchard is often quoted as saying, “In Montana, where I grew up, we had this saying: ‘The time to have the map is before you enter the

woods.’” The lesson is simple; before you embark on any journey, know in advance how to get where you want to go and have contingency options. Otherwise, you start doing something and then end up lost and confused.

How might you use the tools, techniques, and templates in this toolkit to design your map for moving into the forest of the future? What are the first steps?



About the Authors



MJ Hall, PhD MBA, MED

A strategist, performance coach, and business learning advisor, Dr. Hall currently serves as the senior content manager with the ATD Forum. Her expertise includes designing, developing, and facilitating innovative collaborative experiences for senior learning leaders.

Prior to ATD, she served as a Level IV professor, director of leadership development, and special assistant to the Commandant at the Defense Acquisition University, Ft. Belvoir, Virginia. Dr. Hall is an editor and author for the ATD Forum's book *Leading the Learning Function*.



Laleh Patel, MPsy

Laleh Patel is the former senior manager for the ATD Forum, where she steered the engagement and direction of the senior leader, talent development consortium. In this role, she oversaw and managed the overall business strategy and the day-to-day operations of the

community and engaged with executives to develop research and products to meet their most pressing talent development challenges to drive engagement and content strategy for the ATD Forum. Laleh served as an editor for the ATD Forum's book *Leading the Learning Function*.

Suggested Resources

Cope, K. 2012. *Seeing the Big Picture: Business Acumen to Build Your Credibility, Career, and Company*. Austin, TX: Greenleaf Book Group Press.

Caporale, B. 2015. *Creative Strategy Generation: Using Passion and Creativity to Compose Business Strategies That Inspire Action and Growth*. New York: McGraw-Hill Education.

Hall, M.J. 2021 “From Scattered to Structured: Bringing Order to the Ideas.” ATD Insight, June 24. td.org/atd-blog/from-scattered-to-structured-bringing-order-to-the-ideas.

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Lafley, A.G., and R. Martin, 2013. *Playing to Win: How Strategy Really Works*. Boston, MA: Harvard Business Review Press.

Osterwalder, A., and Y. Pigneur. 2010. *Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers*. Hoboken, NJ: John Wiley & Sons.

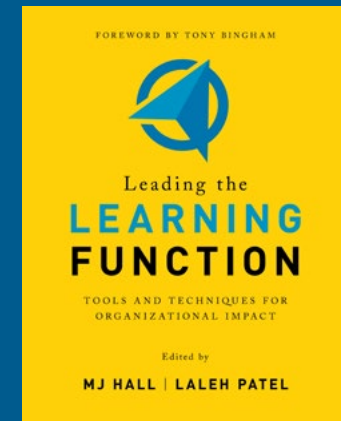
23 Find more tools at td.org/MemberTools.

Suggested Reading

Drawing upon firsthand experiences and insights from senior practitioners, *Leading the Learning Function: Tools and Techniques for Organizational Impact* offers best practices, tools, techniques, and processes that successful business leaders use to develop, build, and implement their personal leadership skill sets.

Growing leadership skills is a lifelong journey; gaining a portfolio of techniques others have used successfully to solve similar business challenges can provide an edge in your role as a business advisor. *Leading the Learning Function* is just that portfolio.

td.org/books/leading-the-learning-function



About the ATD Forum

The ATD Forum is a peer-driven consortium that provides leading talent development companies with a confidential environment in which they can explore and share innovative TD practices that generate business results. Partnering with members, we co-create various opportunities and assets for collaborative learning, which in turn fosters exclusive relationships that solve today's problems while preparing for tomorrow.

Learn more about the ATD Forum at atd-forum.td.org.

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