



Kineo Briefing

Learning Strategy Master Plan

Part 1 – Alignment

By Mark Harrison

Introduction

The elusive search for the holy grail of learning and development has always been the creation of a learning organisation. So how do organisations get there?

Peter Senge popularised a holistic view of a learning organisation in his book, *The Fifth Discipline: The Art and Practice of The Learning Organization* (1990). He characterised these as:

“organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.”

Countless pages have been written on this since and so there has been much greater awareness of what makes an organisation a real learning organisation. What do you have to do to do to reach this goal?

Kineo consultants have seen all the successful learning strategies in practice. In this, the first of four Insight Briefings, we look at the main

characteristics (identified by the American Society for Training and Development) that are consistently present in the most successful learning organisations. These are:

- **alignment (to overall organisational goals)**
- **efficiency**
- **effectiveness**
- **sustainability**

The four characteristics are interrelated.

Alignment

It's important right from the start that your learning strategy is **Aligned** to your organisation's goals. You can set up highly efficient and potentially sustainable learning initiatives but without *real* alignment they will never be properly effective.

Efficiency

Once you have aligned your learning initiatives, you need to get the most out of the limited budgets that you have at your disposal. **Efficiency** has been a major driver behind the adoption of new technologies and continues to be a major catalyst for change in both the private and public sectors. Ultimately, efficiency without effectiveness is pointless – both represent the key components in achieving a return on investment from your training spend.

Effective

So, to be effective you have to match agreed learning needs with the right content and the right approach, at the right time. If you are not aligned, this is not possible.

Combine **Effectiveness** and efficiency and you have the key components of Return on Investment. Without effectiveness it will simply be SOI – Savings on Investment. Effectiveness must lead to tangible benefits, which need to be broadcasted to all of the key stakeholders.

Sustainable

The final key element is that your aligned, efficient and effective learning strategy is set up in such a way that it is **Sustainable**.

The key is to build in sustainability into the whole learning and development infrastructure. You do this by enshrining best practice in transparent processes and procedures, engaging the whole organisation in taking responsibility for the continued success of the learning operation and creating self-perpetuating networks of champions and supporters of learning within the organisation.

In this Briefing we look in more detail at the first of these key components:

Alignment.

Why Alignment is So Important

Alignment to your organisation's goals is the key to the success of your learning strategy.

You can set up highly efficient and potentially sustainable learning initiatives but without *real* alignment it will never be properly effective.

ASTD research shows that

“BEST (Award Winning) Learning Organizations have formal processes to align short and long-term business strategies with competency, learning, and performance solution needs and priorities. The BEST map learning resources to competencies, individual development plans, jobs and corporate goals.”

ASTD 2005.

So, it is against these criteria that all learning activities should be evaluated.

On the next pages, we will look at a number of high level recommendations that were recently developed by Mark Harrison of Kineo in consultation with over a hundred learning professionals in the UK.

He conducted the same exercise for the other components (Efficiency, Effectiveness and Sustainability) and those recommendations are listed in the other three companion briefings.

At the end of this Kineo briefing, you'll get a checklist that can help you work out for yourself how aligned your learning strategy is to your organisation's goals.

1 Confirm your Organisation's Vision, Goals and Drivers

This is the obvious place to start.

You need to:

- know the current and future vision and goals of the organisation
- find out how closely operations in each part of the organisation align to the overall vision and goals
- communicate any major differences between the goals of a business area and the overall goals of the organisation
- know what worries senior management – what are the current key problems?
- check if everyone in your learning and development team knows the organisation's vision, goals and drivers

2 Work Closely with Senior Teams

The process of defining the organisation's vision and goals should bring you close to the top of the organisation. You have to build on these relationships as much as possible.

You need to:

- Ensure HR involvement at the highest level board level and build relationships decision-makers and influencers
- Build credibility for the L&D function through clear and proven alignment
- Proactively communicate your plans to the senior team and stakeholders

- Make senior managers and operations managers own your plans and the budgets
- Senior management must be seen to be involved in learning programmes

3 Look for Areas Where Alignment Is a High Priority

You now have a clear idea about the issues or problems that learning solutions could resolve. Look for where the pain within the organisation is at its greatest and where you will get the least resistance to the implementation of development programmes.

You need to:

- Look for areas in which *compliance* is required (easier to get senior management support)
- Prioritise areas in which levels of knowledge and capability is a big risk to organisational aims

4 Always Offer What People Want (and Need)

If you aim to meet your customer's real needs, you will not need to persuade them to find the time to learn. Understand exactly what they want and give them solutions just when they need it, they will happily take up the learning opportunities you are offering them.

You need to:

- Find out the burning issues for people in your organisation
- Find out what people think of the value of learning opportunities they get (use employee surveys etc)
- Find out if learners feel their learning experience suits them
- Check levels of customer satisfaction

5 Make Evaluation Aligned to Organisational Needs

If you are going to evaluate, it makes sense that you only track the things that will make a difference in the achievement of the organisation's goals. Too often, it is done to check the quality of delivery and not on how much it has contributed to the organisation's strategic direction.

You need to:

- Set up measures that lead to evidence on alignment
- Get buy into the measures from everyone
- Ensure evaluation criteria is linked to learning strategy
- Review your learning programmes and check they really support and enhance organisation goals

6 Work Closely with Each Part of the Organisation

You need to stay close to every one of your clients and build up the sort of support that is essential for the success of learning programmes.

You need to:

- Ensure learning and development is regarded as a part of everyone's job
- Ensure managers become trusted partners
- Get managers to be assessed on how they have helped the learning and development of their staff
- Make sure the learning and development function is brought in early to key initiatives
- Encourage operations and businesses to request your help
- Check how frequently the organisation, without prompting, asks for meetings with you

7 Make Sure You Have Quick Decision-making Processes

You have to be quick on your feet to keep up with the changes within your organisation.

You need to:

- Ensure that your strategy responds quickly to changes in the organisation's overall strategy
- Develop champions who are committed to support your learning initiatives
- Reduce the number of touch-points or points in which you need sign off

8 Match Training Spend to Its Importance to the Organisation's Goals

This is where you need to look at things from a financial point of view.

You need to:

- Monitor the investment on learning initiatives to check they are in line with priorities
- Ensure the learning and development function is rewarded on how well the organisation performs

Your Alignment Checklist

1	Confirm your organisation's vision, goals and drivers	Already doing this	Could do more of this	Must start doing this
1.1	Know current and future vision and goals of the organisation			
1.2	Find out how closely operations in each part of the organisation align to the overall vision and goals			
1.3	Communicate any major differences between the goals of a business area and the overall goals of the organisation			
1.4	Know what worries senior management – what are the current key problems?			
1.5	Check if everyone in your learning and development team knows the organisation's vision, goals and drivers			
2	Work closely with senior teams	Already doing this	Could do more of this	Must start doing this
2.1	Ensure HR involvement at the highest level board level and build relationships decision-makers and influencers			
2.2	Build credibility for the L&D function through clear and proven alignment			
2.3	Proactively communicate your plans			

	to the senior team and stakeholders			
2.4	Make senior managers and operations managers own your plans and the budgets			
2.5	Senior management must be seen to be involved in learning programmes			
3	Look for areas in which alignment is a high priority	Already doing this	Could do more of this	Must start doing this
3.1	Look for areas in which <i>compliance</i> is required (easier to get senior management support)			
3.2	Prioritise areas in which levels of knowledge and capability is a big risk to organisational aims			
4	Always offer what people want (and need)	Already doing this	Could do more of this	Must start doing this
4.1	Find out the burning issues for people in your organisation			
4.2	Find out what people think of the value of learning opportunities they get (use employee surveys etc)			
4.3	Find out if learners feel their learning experience suits them			
4.4	Check levels of customer satisfaction			
5	Make evaluation aligned to organisational needs	Already doing this	Could do more of this	Must start doing this
5.1	Set up measures that lead to			

	evidence on alignment			
5.2	Get buy into the measures from everyone			
5.3	Ensure evaluation criteria is linked to learning strategy			
5.4	Review your learning programmes and check they really support and enhance organisation goals			
6	Work closely with each part of the organisation	Already doing this	Could do more of this	Must start doing this
6.1	Ensure learning and development is regarded as a part of everyone's job			
6.2	Ensure managers become trusted partners			
6.3	Get managers to be assessed on how they have helped the learning and development of their staff			
6.4	Make sure the learning and development function is brought in early to key initiatives			
6.5	Regularly meet with management to confirm organisational needs			
6.6	Develop champions who are committed to your initiatives			
6.7	Encourage operations and businesses to request your help			
6.8	Check how frequently the organisation, without prompting, ask for meetings with you			

7	Make sure you have quick decision-making processes	Already doing this	Could do more of this	Must start doing this
7.1	Make sure that your learning strategy responds quickly to changes in the organisation's overall strategy			
7.2	Develop champions who are committed to support your learning initiatives			
7.3	Reduce the number of touchpoints – if you have trust you need less layers of decision-making			
8	Match training spend to its importance to the organisation's goals	Already doing this	Could do more of this	Must start doing this
8.1	Monitor the investment on learning initiatives to check they are in line with priorities			
8.2	Ensure the learning and development function is rewarded on how well the organisation performs			

If you would like more information, advice or help on Alignment, why not contact Kineo at info@kineo.co.uk or on +44 (0)870 3830003.

We will be releasing the three remaining parts of Learning Strategy Master Plan in the coming months.

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