



Create a Learning and Development Strategy

Transform your learning and development function from reactive to strategic.

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EXECUTIVE SUMMARY

Situation

- Delivering effective learning and development (L&D) to employees is a key driver of bottom-line results; organizations with strong L&D programs are more profitable, more productive, and have greater customer satisfaction.
- Today, the increased role that individuals play in creating value for organizations makes a focus on L&D even more critical.

Complication

- Organizational leaders remain unsatisfied with the performance of their current L&D functions.
- Employees are leaving organizations because they are not receiving the training and development that they were promised when they were hired.

Resolution

- Highly effective HR departments create programs that are deeply aligned with the strategic needs of their organizations. L&D departments need to do the same.
- Involve key stakeholders from the beginning and perform a comprehensive needs analysis to understand the type of support from L&D that would be most valuable.
- Create an L&D framework that details a vision, objectives, primary learning needs, employee groups, core delivery methods, measurement, and governance to ensure that your L&D function has a clearly articulated purpose and roadmap for the future.

Key Insight:

L&D can't be all things to all people. It needs to be focused on proactively identifying and developing the critical learning needs that will enable the organization to deliver on their strategic objectives.

Before starting this project

Be prepared to:

- **Gather information about the strategy** and goals of the organization.
- **Speak with key senior stakeholders** to understand their objectives and feedback on current L&D initiatives.
- **Work cross-functionally** with functional leaders and other stakeholders in HR (including business partners and Talent Management leaders).

This blueprint is most helpful when:

- **The learning function is reactive**, and the **L&D leader wants to be proactive** in identifying high-impact priorities.
- **Learning has been identified as a priority area** for key stakeholders; use McLean & Company's **HR Stakeholder Management Survey** to understand how your stakeholders see the function.

An L&D strategy includes the following:

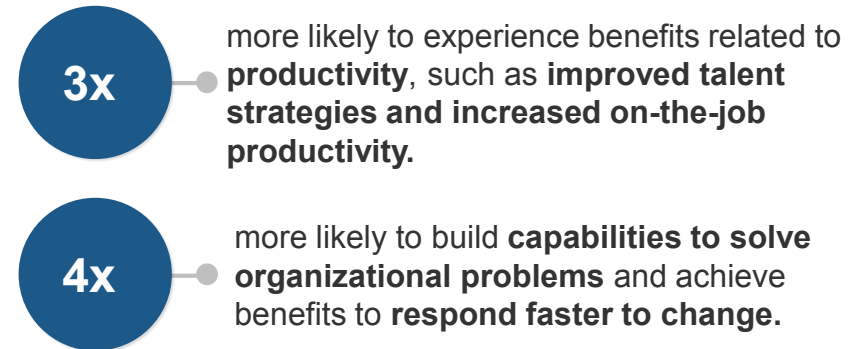
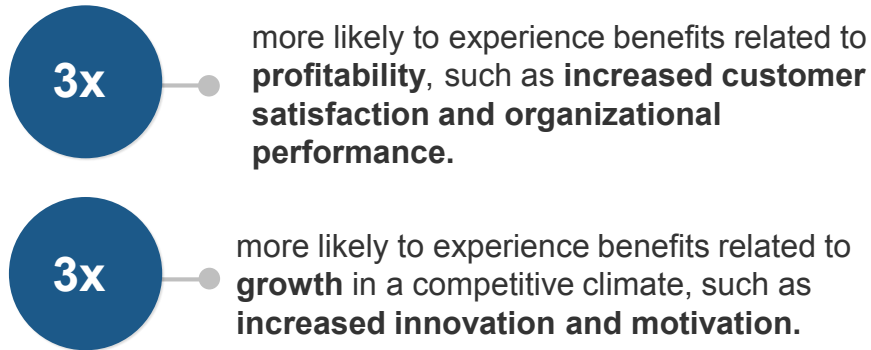
- ✓ Conducting a **rigorous needs analysis** that evaluates **what learning will have the greatest impact** on achieving the strategic goals of the organization.
- ✓ Evaluating and updating **how the L&D function operates** and what activities it should be engaged in to best meet those priority needs.
- ✓ Identifying gaps (in programs, infrastructure, and capabilities) that are limiting L&D's ability to realize the desired future state, and **creating a clear action plan** to guide the function into the future.

McLean & Company insight

There is no shortcut for a rigorous and planful needs analysis. Even though it is easier and less time consuming to skip the phase of gathering information from stakeholders, **the L&D strategy needs to be grounded in a solid understanding of the organizational objectives and the potential obstacles to achieving them.**

Learning drives bottom-line results

High-performing learning organizations are:

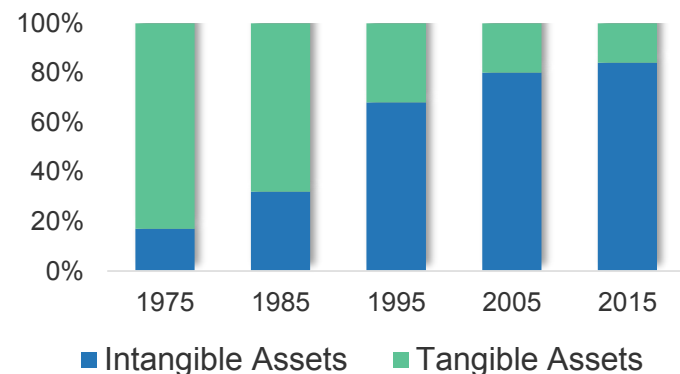


Daly & Overton, 2017

People have become the **core source** of organizations' **competitive advantage**, which **increases the impact of effective L&D**.

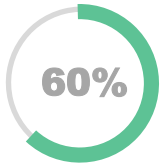
People and the intellectual property they create have replaced **physical assets** as the primary source of value for organizations.

Components of S&P 500 Market Value

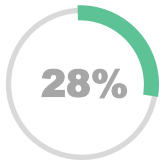


Ocean Tomo, 2017

Today, L&D is more critical than ever, but it falls short of leaders' expectations



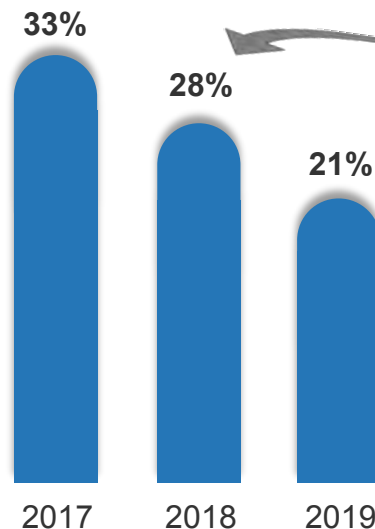
of executives “expect that **up to half** of their organization’s workforce **will need retraining or replacing** within five years.”



of executives expect that “**more than half** of their organization’s workforce **will need retraining or replacing.**”

McConnell & Schaninger, 2019

Average Effectiveness of L&D



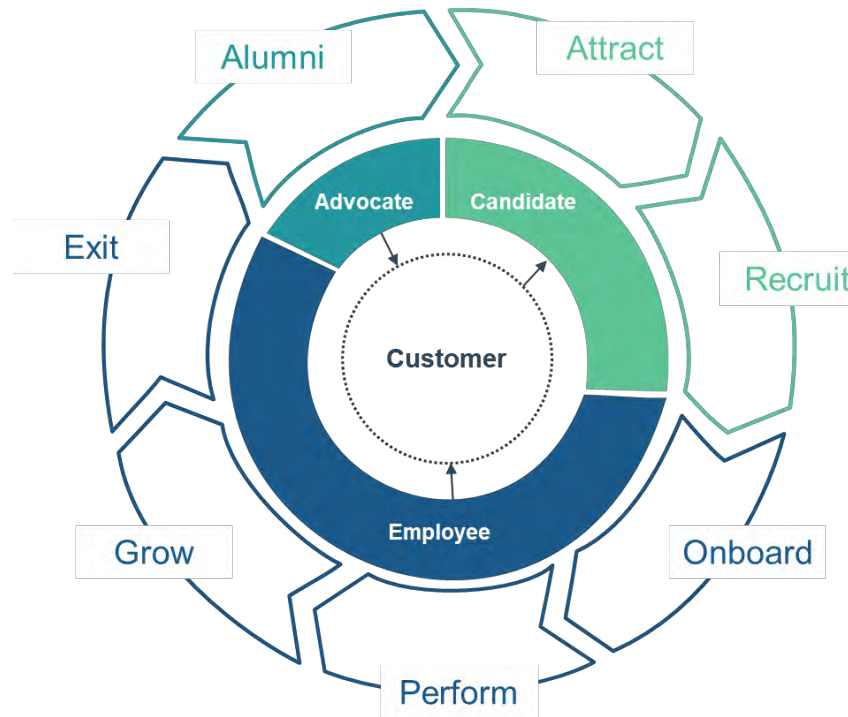
Declining effectiveness scores over time demonstrate that **organizations want and need more from their L&D programs.**

McLean & Company HR Trends Database, 2019, N=907

Employees' expectations for L&D are also not being met

40% of employees leave organizations because of lack of career-related skills development.

McLean & Company Exit Database, 2019; N=7,145

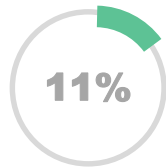


Over **one-third** of new employees cite development opportunities as one of the most important factors in accepting a new position.

McLean & Company New Hire Database, 2019; N=117,337

There is a gap between what employees expect for L&D when they join **and the reality** they encounter.

Creating an L&D strategy improves overall L&D effectiveness and drives employee engagement



of organizations have implemented a holistic L&D strategy.



These organizations had significantly higher effectiveness in all areas of L&D.

McLean & Company 2019 Trends Report, N=458

Effective L&D in turn drives employee engagement

ENGAGED EMPLOYEES

71%

68%

71%

Report that the **training** they received in the last year has **helped them perform their job better**.

Report that they have **received an adequate amount of training** in the last year.

Report that they are **encouraged to pursue career development** activities.

DISENGAGED EMPLOYEES

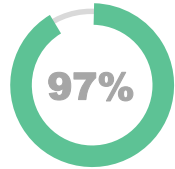
12%

14%

12%

McLean & Company Engagement Database, 2019; N=105,016, N=101,985, and N=129,661 respectively

L&D needs to be aligned with strategic goals of the organization to be most effective



of leaders in **high-performing learning organizations** believe **learning is aligned with the business plan** (compared to only 37% of their peers).

Daly & Overton, 2017

Characteristics of highly effective HR*

L&D strategy



They **plan for the future** (using a minimum of a one-year strategic plan).



Identify and map key actions for the learning function.



They **offer a comprehensive portfolio aligned with organizational strategic needs**.



Align and focus resources on the most important learning needs.



They **use metrics and analytics** to develop insight-driven solutions and support decision making.



Measure the impact on organizational goals and **use data to drive continuous improvement**.

“You can’t spend time and resources on courses that don’t focus on where the organization is going. If it is not supporting the strategic objectives of the organization, you have to ask yourself – why am I doing this?”

– Siobhan Calderbank, Director of Learning & Development, Intelix Technologies

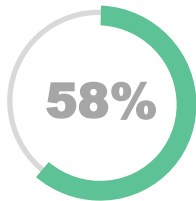
* McLean & Company HR Trends Report, 2019. Characteristics were identified from statistical analysis of 907 responses.

To be successful, L&D also needs to be aligned with how employees like to learn



Rio, 2017

Employees like to learn differently



of employees
prefer to **learn at
their own pace.**



of employees
prefer to **learn at
work.**

Spar & Dye, 2018

Millennials have different learning preferences compared to their peers.



In-class learning: They would like to spend **12%** less time on in-classroom training.



Gamification: **38%** of them believe that their video-gaming consumption helps them in learning important work-related skills.



Coaching: They believe role-playing feedback with a manager to be **33%** more important than older employees do.

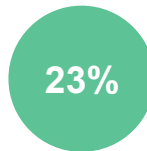
Magnacca, 2018

Aligning core delivery methods with employees' learning preferences helps transform them to heavy learners

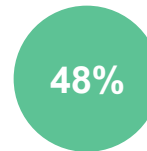
Heavy learners (>5 hours/week) vs. light learners (<1 hour/week)



more likely to feel
**productive and
successful**



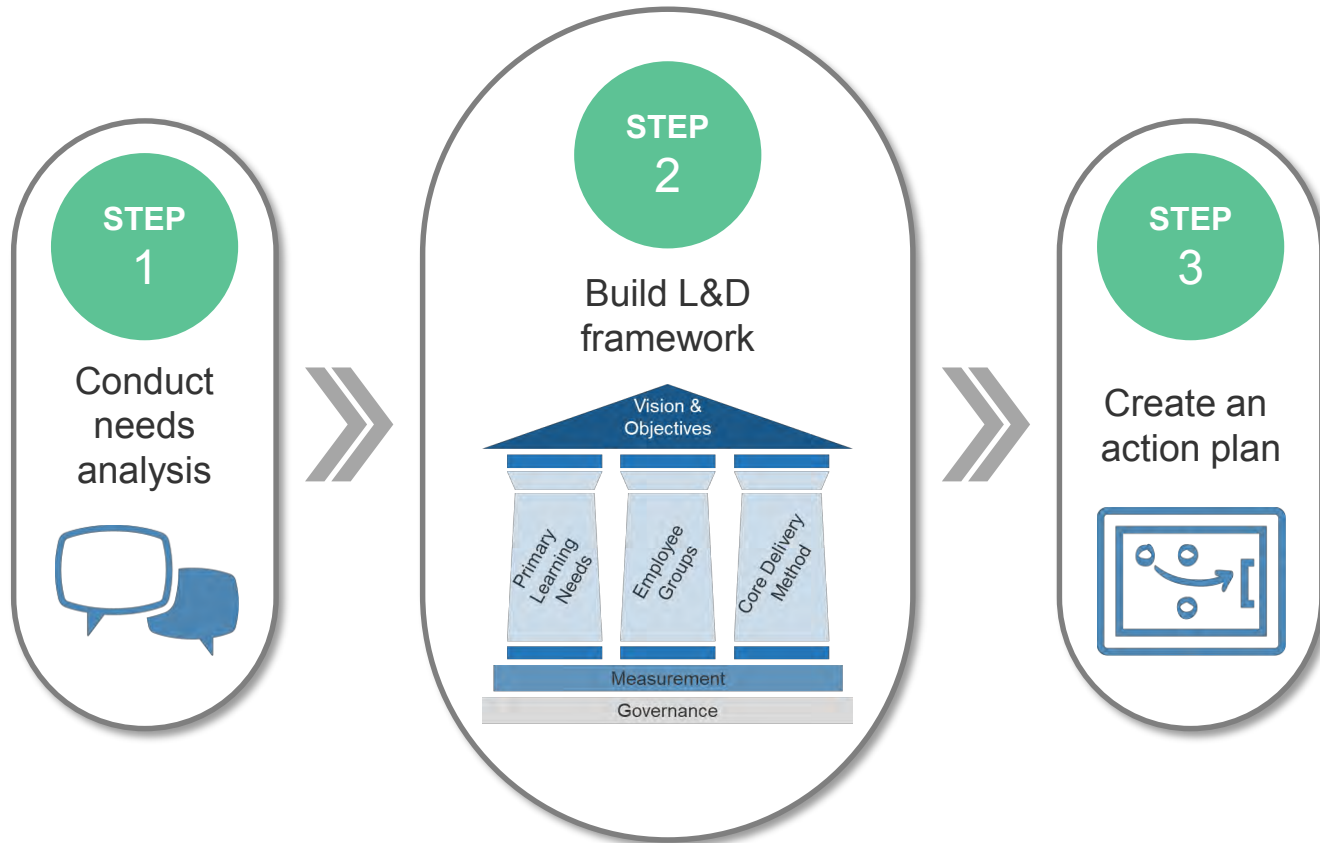
more likely to **take
on additional
responsibilities**



more likely to have
found **purpose in
their work**

Bersin, 2018

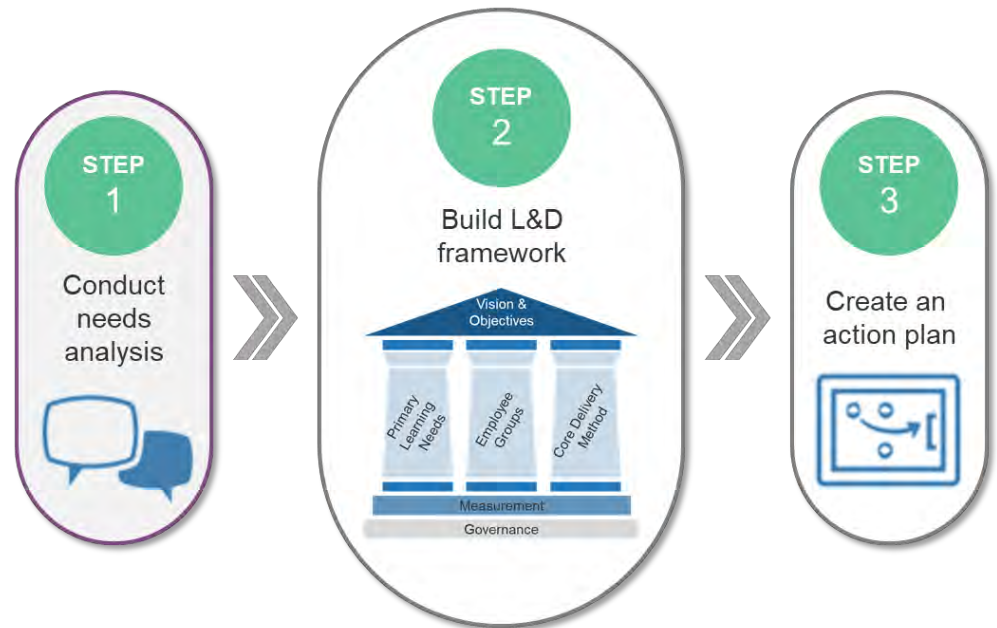
Follow McLean & Company's three-step process to create an L&D strategy



STEP 1: CONDUCT NEEDS ANALYSIS

AFTER COMPLETING THIS STEP YOU WILL HAVE:

- a) Formed an L&D steering committee
- b) Identified a vision, objectives, and strategic metrics for L&D
- c) Completed a comprehensive needs analysis



Form an L&D steering committee

Create a steering committee with stakeholders in the organization to assist with making decisions about the strategic direction of L&D. The committee will help **set the vision, gather data, ensure strategic alignment, make connections**, and ultimately **champion the L&D strategy**.

Stakeholders	Role	Why they are essential players
Head of HR/ Head of L&D	Lead: Drives the strategy creation process and brings stakeholders together.	HR's focus is on the people resources of the organization; they have a clear understanding of how and where the L&D function can support the business strategy.
Executive Team	Participants: Provide strategic guidance and feedback and act as L&D strategy champions.	The executive team sets the strategic direction of the organization. They know where the organization needs to be in the future and the skills necessary for achieving the future state.
L&D or HR Team	Participants: Give feedback that helps to shape the strategy.	HR is familiar with L&D programs in place; they know what's working and what isn't and can provide insights into HR strategy.
Management Team/HRBP	Participants: Give feedback that helps to shape the strategy.	The management team/HRBP has an on-the-ground perspective of what the current state of L&D is in the organization.
Employees	Participants: Give feedback that helps to shape the strategy.	The opinions of employees from varying levels and locations should be taken into consideration.

Review strategic documents and speak with key senior leaders

1

Talent Strategy

This document should identify the organizational priorities that HR supports and how it plans to do so. Fast-track through this step by reviewing:

Talent Implications: The requirements, effects, or consequences on talent due to the organizational direction.

Strategic Pillars & HR Outcomes: The vision for HR and what HR needs to accomplish to achieve it.

2

Other Strategic Documents

Every organization has a number of documents that define where it is trying to go and how it plans to get there. Review:

- Organizational and functional strategies
- Industry or competitor analysis
- Annual reports

3

Senior Leader Conversations

These conversations **clarify the strategic goals** and **provide feedback on L&D** activities and areas where the leaders want greater support. Taking the time to have these conversations also **builds relationships and allies who will champion L&D**.




Use the [L&D Strategy Interview Guide](#) to conduct interviews with senior leaders



Understand these four factors before proceeding

- | | | |
|---------------------------------------|---|--|
| Organization Vision, Mission, Mandate | → | What the organization aspires to be and its purpose. |
| Organization Strategy | → | Goals the organization has set, capabilities it uses to achieve goals, the projects it wants to pursue – and how these three components support one another and are measured . |
| Senior Leader Needs/Expectations | → | The expectations of key stakeholders that HR needs to deliver on through the L&D strategy. Current L&D that is effective , needs to be improved , and is missing . |
| External Factors | → | Trends in the operating environment and industry that do, or could, have a significant impact on the organization. |

Create a vision for L&D to make the scope of its activities clear

Questions to answer		Examples of common answers
What are the primary outcomes we seek to influence?		<ul style="list-style-type: none">• Achieve strategic objectives• Manage or shift the culture• Improve employee engagement• Attract and retain talent by improving the employee value proposition• Minimize risk by delivering mandatory training
Are we current or future focused?		<ul style="list-style-type: none">• Ensure employees have the right skills to do their current jobs• Identify and deliver programs that help transform the organization• Prepare employees for future roles (in existing career paths)
Do we deliver training or facilitate knowledge transfer?		<ul style="list-style-type: none">• Develop and deliver programs aligned with learning needs of the organization• Provide the infrastructure that supports learning in the organization

McLean & Company insight

The vision of L&D should not be to solve every knowledge gap or drive all development activities. It should articulate where the function is going and how it supports the long-range vision and goals of the organization.

Define clear objectives for L&D and identify strategic metrics

Review the results of your **strategy document review** and identify **three to five objectives** and **two to four metrics for each**. These will enable measurement at level 4 of the Kirkpatrick model ([see appendix](#)).

Document the vision and objectives in the [L&D Strategy Presentation Template](#).



The L&D **vision** defines **where** the function is going

The **objectives** describe **what** needs to happen to achieve the vision

The **metrics** capture **how** success will be measured

Create capabilities in the workforce that enhance or build competitive advantages required to achieve the strategic goals.

Increase customer focus of organization to deliver products and services that create exceptional customer experiences.

Equip leaders of growth regions with tools to design and execute growth strategies.

- Customer retention rate
- Net promoter score
- Average lifetime value of customers

- Market penetration rates for regions
- Expansion project milestones achieved on time/budget

McLean & Company insight

If the connection between the objectives and strategic metrics isn't clear, this may be an indicator that the **vision and objectives aren't properly aligned with the strategy**.

See the [appendix](#) for instructions on how to measure L&D's impact on these metrics.

Learning initiatives are often scattered throughout the organization and contained in numerous formats. This exercise is **not about L&D taking control over all content** but **ensuring alignment** where required and **limiting duplication** of work.

- ## Information to collect

- ## Benefits of L&D inventory

- [illegible]



Gather existing data and feedback from systems currently in place

Examine survey data:

Look for specific questions, metrics, or **information related to L&D**. Pay attention to what stakeholders are specifying as positive or negative about L&D to identify opportunities for improvement.

Surveys to examine:



[McLean Employee Experience Monitor](#)



[Employee Engagement](#)



[Exit](#)



[New Hire](#)

Additional data and feedback may be available in:

Competency Framework(s): The behavioral articulation of the required knowledge, skills, and abilities required to achieve organizational objectives.

Learning Management System (LMS): Information about which courses employees are accessing and how they are performing will help identify the depth and breadth of competency gaps.

Strategic Workforce Plans: Critical roles, growth areas, and projected shortfalls all directly influence where strategic L&D activities should be targeted.

Performance Management: Low-scoring areas or common development goals will indicate areas of weakness.

360-Degree Feedback: High or low areas will indicate areas of strength or weakness.

Succession Plans: Roles that employees are being developed for may require specific L&D programs.

Customer Feedback: Negative customer feedback indicates areas of weakness, skill gaps, and employee groups that L&D programs can target.

Speak with stakeholders at all levels to gain an understanding of learning needs

Approaches for collecting information:

Focus groups

- + Provides in-depth discussion and information from multiple sources
- Time consuming, and group dynamic may affect information provided

One-on-one interview

- + Provides opportunity for an open and honest discussion
- Doesn't allow for consensus or provide opportunity to build on other ideas

Survey/Questionnaire:

- + Provides large amount of feedback from numerous stakeholders and can be completed when it is convenient
- Response rates vary, limits questions asked, and all stakeholders need access to a computer

Questions should address:

- Current **challenges** in their role
- Skills and **competency gaps** affecting their team and the organization
- **Satisfaction** with current L&D initiatives
- Desired or **missing L&D initiatives**
- **Willingness to support** new L&D initiatives
- **Preferred learning methods** (online, facilitator-led, etc.)
- **Amount of time available** for learning and desire for more or less dedicated time

Determine appropriate approach based on:

Time constraints, resources, budget, and organizational culture

McLean & Company insight

Stakeholders can offer insight into not only **what they need to know** but also **how and when** they prefer to learn. Seek a deeper understanding of where learners are.

Customize the [Standard Focus Group Guide](#) using questions from the [appendix](#) to help conduct focus groups with stakeholders.



Examine the information collected and extract insights on the current state of L&D

Common insights will include **competency gaps**, **low-performing processes**, **challenges to particular objectives**, **satisfaction with current L&D offering**, or **issues in accessing learning**.

Stakeholder Consultation



Data Sources

- Senior stakeholder interviews, employee focus groups

Potential Insights

- Competency gaps, challenges to achieving objectives, satisfaction with current L&D offering

Talent Management Data



Data Sources

- 360-degree feedback reports, succession plans, performance management results, IDPs

Potential Insights

- Competency gaps, common development objectives, critical roles in need of development

Employee Surveys



Data Sources

- Engagement, New Hire, and Exit surveys

Potential Insights

- General satisfaction with learning and development opportunities, employee groups in need of increased development

Digital Learning Platforms



Data Sources

- LMS, vendor platforms

Potential Insights

- Most common courses being accessed, performance of current offering (scores and completion rates)

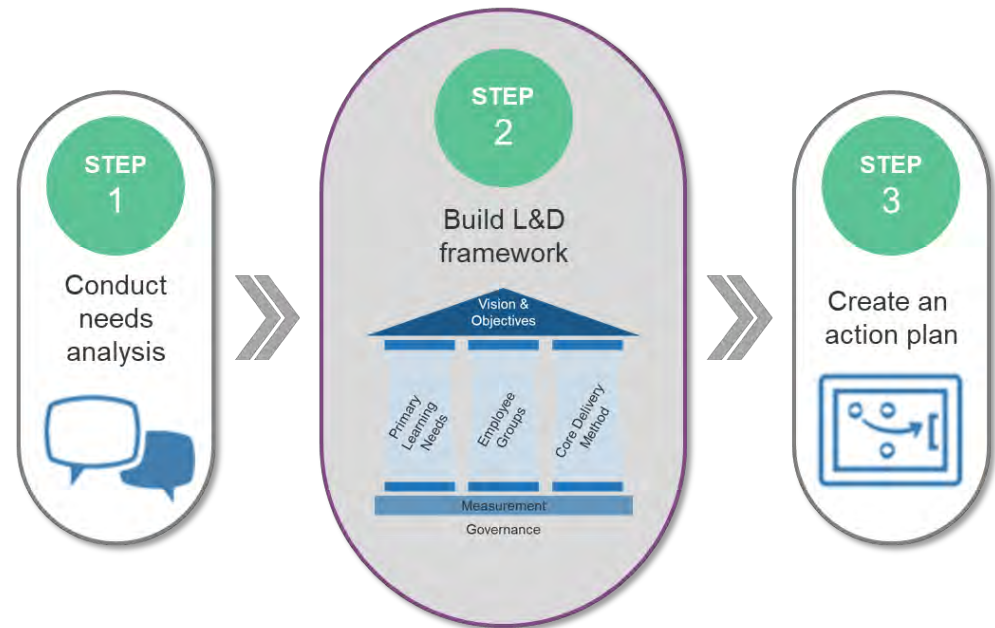
Document insights on Tab 3 of the [L&D Strategy Workbook](#).



STEP 2: BUILD L&D FRAMEWORK

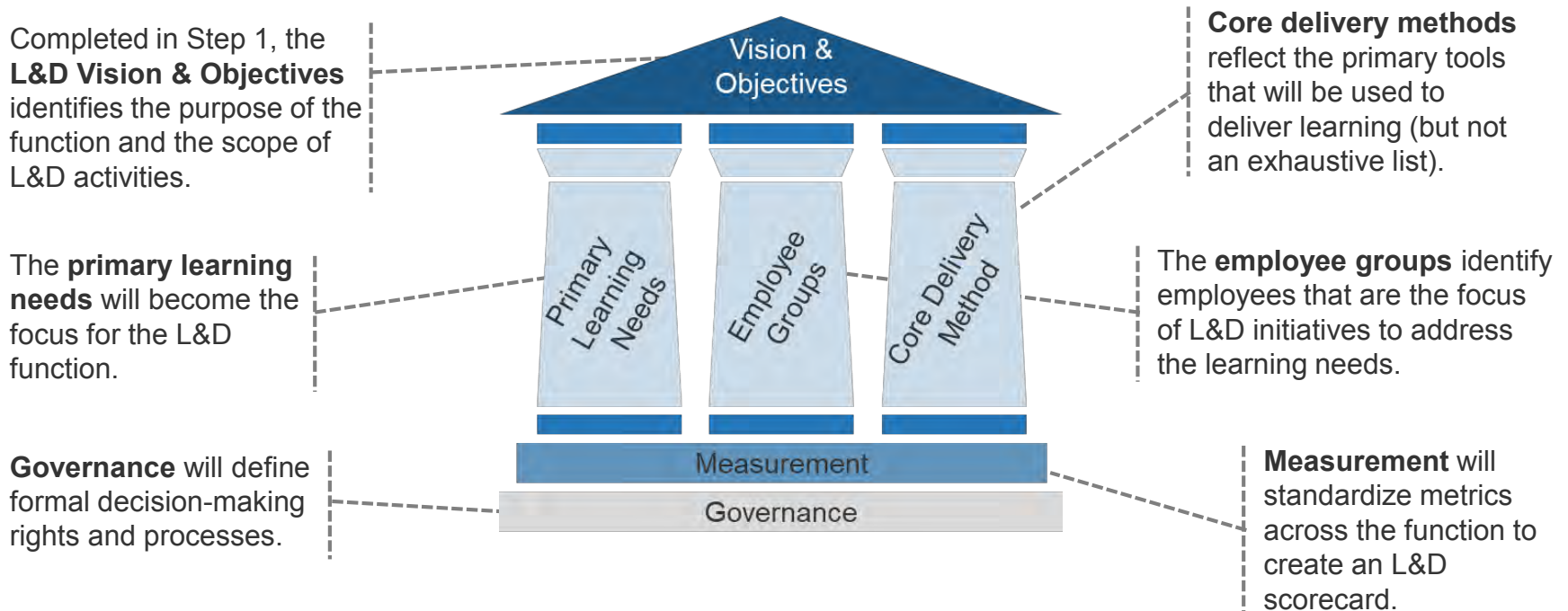
AFTER COMPLETING THIS STEP YOU WILL HAVE:

- a) Identified the primary learning needs
- b) Selected priority employee groups
- c) Identified the core delivery method(s)
- d) Created a standardized measurement approach
- e) Identified key accountabilities to form the core of a governance model



Complete the L&D framework to define the future state of the function

The purpose of this framework is to **identify the infrastructure required to deliver learning and development** to the organization, not to make decisions on a program-by-program basis.



McLean & Company insight

It is important to listen and involve key stakeholders, but the L&D framework should **reflect a realistic vision of the function aligned with the strategic objectives of the organization, rather than address everyone's needs.**



Determine the primary learning needs that L&D will address

Review the insights from the current state analysis and work through the following steps to identify the primary learning needs.

1 Look for common themes across the insights from the current-state analysis.

Example

Stakeholder interviews

Poor progress on digital transformation priority

Performance data

Low scores on change management capabilities

Employee focus groups

Don't understand why or how to use new systems

Common Theme:
Change Management

2 Identify mission-critical issues that surfaced during the current-state analysis.

Example

Stakeholder interviews

Expansion in Asia requires experienced and capable leaders.

Critical Issue:
Asian business acumen in leaders

Performance data

Consistent late project deliver/cost overruns due to lack of project managers.

Critical Issue:
Project Management

McLean & Company insight

Be aware of **issues that can derail critical objectives or projects identified by the senior stakeholders**. Just because an issue only appeared in one part of the needs analysis doesn't necessary mean it can be ignored.

Document themes and critical issues on Tab 4 of the [L&D Strategy Workbook](#).



Example

Change Management

1. Manager training on leading change
2. Individual contributor training on change resilience



Example

Foundational Management Competency

1. First-time manager training

Use Tab 5 of the *L&D Strategy Workbook* to prioritize learning needs.



Identify employee groups related to primary learning needs and create learner profiles

Examine each primary learning need and determine which employee groups they apply to.

- If the answer is all, then learner profiles are not a practical solution, but if they focus on targeted groups, take time to **examine those segments and document how they like to learn** instead of just what they need to know.

Learner profiles will ensure you are designing with the user in mind, improving the impact of the strategy.

- The simplest approach is to **create a profile for each level** (individual contributor, manager, or senior leader) within the group.
- A more advanced method is to look for traits that exhibit broad differences and create profiles for each variation. These can be driven by department, potential/performance, or demographics.

Provide a brief list of distinguishing features for the profile group.

Samantha
The middle manager

Has 5-10 direct reports

What are they trying to learn?

- How to manage conflict and dispute within team
- Improve mentoring ability to help report develop
- Learn methodology to improve efficiency

What channels do they typically use?

- Lives by cell phone as spends many days on site
- Uses laptop in office to access intranet, LMS and other organization software
- Heavy Outlook & Explorer user

When and where are they accessing information?

- Access information offsite, at home, and in transit as much or more than in office
- Typically logs into LMS during commute or evening hours

Learning Characteristics

Characteristic	Level
Need for up to date information	H
Urgency to find information	H
Dedicated time to learning	H
Willing to try new things	H
Digital literacy	H
Access to internet	H

Experts recommend naming the profile to encourage empathy, but at minimum, create a tag that explains who the profile represents.

Review the **focus group (or interview/survey) results** to understand the type of information this group is seeking, and how, when, and where they typically go about finding it.

Review the focus group results to complete this section. You may need to gather some more information.

Use McLean & Company's [Learner Profile Template](#) to document the profiles.





Review options for core delivery methods

Core delivery methods will be the primary tools used to deliver learning to the organization.

- The selected methods will help **identify both technology requirements and L&D team competencies**.
- They help **identify the L&D function competencies and supporting technologies** that will require investment.
- Organizations can choose **multiple core delivery methods**, but it will come at the **cost of additional resources and less economies of scale**.
- **Blended learning is recommended at the program level**; additional learning methods will still need to be built.

	Reliance on Technology	Technology Characteristics	Typical L&D Capabilities
Formal digital Structured online courses and materials (e.g. eLearning)		<ul style="list-style-type: none"> • Content management • Audit/compliance capabilities • Reporting and analytics 	<ul style="list-style-type: none"> • Instructional design • LMS management • Vendor management
Informal digital Online content that is not heavily influenced by instructional designers (e.g. curated learning)		<ul style="list-style-type: none"> • Content management • Advanced search capabilities or content recommendations 	<ul style="list-style-type: none"> • Program management • Content management
Peer-to-peer Facilitated programs that enable learning through social interactions (e.g. mentoring)		<ul style="list-style-type: none"> • Collaboration and communication capabilities 	<ul style="list-style-type: none"> • Program management • Stakeholder management • Facilitator training
Face-to-face In-person sessions on a particular topic led by a facilitator (e.g. classroom learning)		<ul style="list-style-type: none"> • Recording or VR capabilities if remote audience 	<ul style="list-style-type: none"> • Instructional design • Facilitation • Scheduling/administration
Outsourced Vendors deliver required learning (e.g. vendor-led classroom learning)		<ul style="list-style-type: none"> • Vendor partners supply cloud solutions 	<ul style="list-style-type: none"> • Vendor management • Program management



Evaluate the following factors and select core delivery methods

Vision & Objectives

Review the vision and objectives to identify if they reflect, or exclude, any of the options.

Organizational Culture

Examine focus group results and the perspective of the L&D steering committee.

Learning happens when people are comfortable. New and different methods should be rolled out over an appropriate period of time.

Learning Needs

Review L&D framework and **evaluate the complexity** (degree of difficulty), the **uniqueness to each learner** (degree of standardization), and the **number/similarity of learning needs**.

Employee Preferences

Review learner profiles and evaluate learners' ability to access technology platforms, the amount of time available for learning, the degree of colocation, and their desire for self-directed learning.

**Core
delivery
method(s)**

McLean & Company insight

Selecting a core delivery method will help **clarify requirements for technology, HR capabilities, and structure**. It also helps reinforce that L&D is not responsible for all development activities (and should be aligned with the vision and objectives).

Record the selected core delivery method(s) in the *L&D Strategy Presentation Template*.



Outline a measurement approach that standardizes evaluation across L&D



Measurement should be standardized to make reporting and analysis easier. Not all learning interventions require evaluation beyond level 1 of the Kirkpatrick model (see appendix); create guidelines to identify when higher levels of evaluation are required.

- Different methods (for example, eLearning versus classroom) may require different questions, but when possible **use consistent language to make the responses comparable.**

REACTION



Select Standard Questions:



Standard Participant Training Session Evaluation Template

Sample Measurement

- Participant satisfaction with the program
- Participation rates
- LMS reporting (course enrollment rates, completion rates, etc.)

Record measurement approach in the [L&D Strategy Presentation Template](#).



LEARNING



Create Evaluation Criteria:

- Identify triggers around delivery cost, hours spent learning, or strategic importance (e.g. related to leadership competencies).
- If applicable, set a recommended standard for when tests are administered (before, after, 3-6 months following completion, etc.).

Sample Measurement

- Pass rate (or average result) for training/average scores on tests
- Difference between test scores administered immediately after and several months following
- Feedback from participants

BEHAVIOR



Create Evaluation Criteria:

- Identify triggers around delivery cost, hours spent learning, or strategic importance (e.g. related to leadership competencies).
- Choose a preferred evaluation method.

Sample Measurement

- Average change in 360-degree feedback, self- or manager evaluation administered before and after training
- Average change in performance review competency evaluation
- Speak with managers and/or participants regarding impact of learning intervention on behavior



Determine required L&D governance

L&D governance refers to **a set of decision rights and standard processes** and can create better alignment with strategic priorities and increased efficiencies.

- Evaluate three levels of activities when creating governance: **strategy**, **design and build**, and **deliver**.
- Review the major players (e.g. steering committee, HRBPs, head of L&D, L&D professionals) and determine who will be responsible for what activities.

DESCRIPTION

TYPICAL ACTIVITIES

Strategy

Decisions that directly connect to the strategic direction of the organization

- Typical timeline: one year or more

- Selection of organizational learning priorities
- Approval of organization-wide L&D curriculum
- L&D scorecard review
- Budgetary approval (and provision of funds)

Design & Build

The process of creating learning interventions. This can also include certain strategic decisions at a line of business (LOB) or regional level.

- Typical timeline: one to three months

- Selection of external learning partners and technologies
- Evaluation and approval of new learning initiatives
- Creation of new learning initiatives

Deliver

The activities involved in delivering learning to the organization

- Typical timeline: daily-weekly

- Delivery of learning initiatives
- L&D data collection

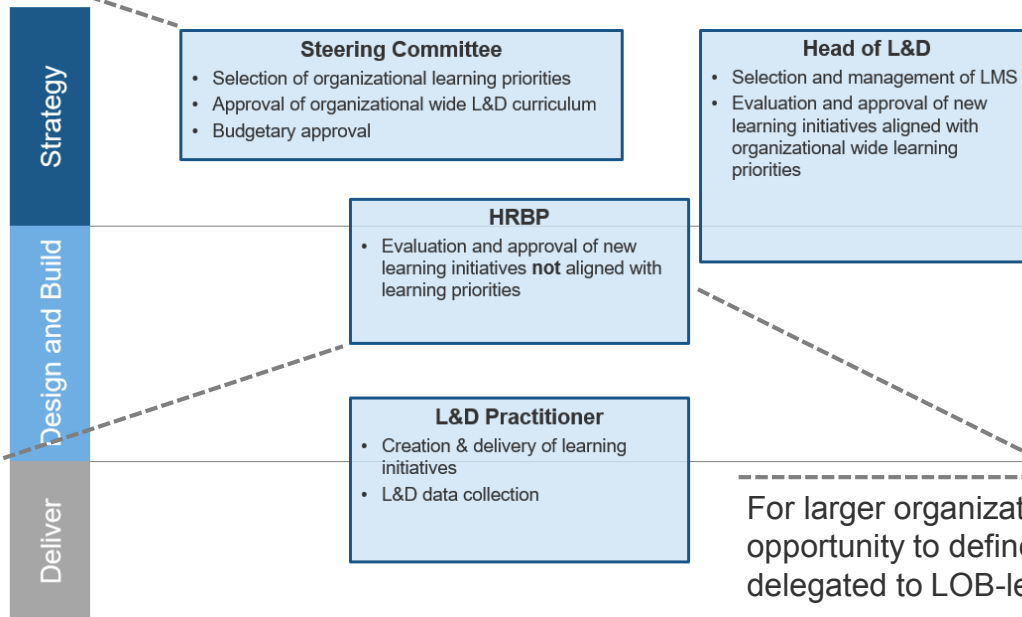


Create a governance map to visualize the required structures

A governance map is a simple way of identifying and visualizing the scope of activities and decisions key players are accountable for.

Ensure all major players are considered for inclusion in the governance map.

Governance Map - Example



It's typical for the scope of activities for some players to cross over levels.

In Step 3 additional actions (such as creating standard processes) will be evaluated and added to the action plan if required.

For larger organizations, this is also an opportunity to define activities that will be delegated to LOB-level professionals.

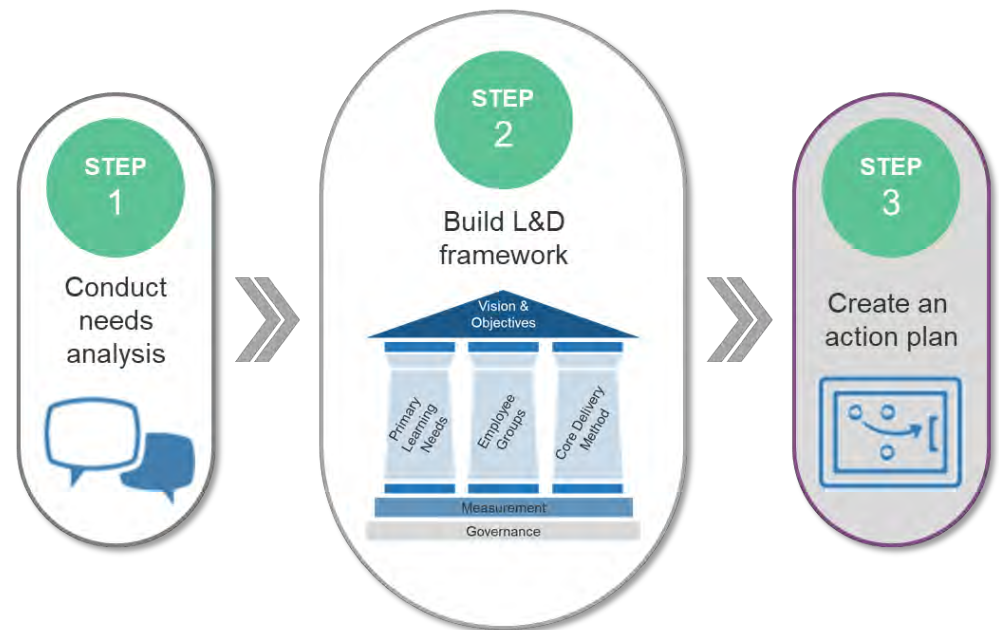
Customize the governance map in the *L&D Strategy Presentation Template*.



STEP 3: CREATE AN ACTION PLAN

AFTER COMPLETING THIS STEP YOU WILL HAVE:

- a) Identified gaps between the L&D framework and the current state of L&D
- b) Prioritized gaps that will have the most impact
- c) Created an action plan to address the priority gaps



Create an action plan that will turn the L&D framework into reality

Use McLean & Company tools to make the process easier

Tab 6 of the *L&D Strategy Workbook*

Standard Learning Needs	Gap	Effort	Evaluation	Impact
Implement an HR data system	HR data system not yet implemented	Medium	High	High
Training and development for the HR managers	HR managers lack training in HR management	Low	Medium	Medium
Training and development for the HR managers	HR managers lack training in HR management	Low	Medium	Medium
Training and development for the HR managers	HR managers lack training in HR management	Low	Medium	Medium
Training and development for the HR managers	HR managers lack training in HR management	Low	Medium	Medium

Identify Significant Gaps

Compare the framework against the current state of L&D to identify gaps.

Tab 7 of the *L&D Strategy Workbook*

High Impact/Low Effort	High Impact/High Effort	Low Impact/Low Effort	Low Impact/High Effort
Implement an HR data system	HR data system not yet implemented	HR data system not yet implemented	HR data system not yet implemented
Training and development for the HR managers	HR managers lack training in HR management	HR managers lack training in HR management	HR managers lack training in HR management
Training and development for the HR managers	HR managers lack training in HR management	HR managers lack training in HR management	HR managers lack training in HR management
Training and development for the HR managers	HR managers lack training in HR management	HR managers lack training in HR management	HR managers lack training in HR management

Prioritize Gaps

Use simple ranking criteria to prioritize the gaps and ensure actions will have the greatest impact on the organization.

Tabs 8 and 9 of the *L&D Strategy Workbook*

Initiative	Owner	Start	End	Start	End	Start	End	Start	End	Start	End	Start	End
Implement an HR data system	HR data system not yet implemented	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Training and development for the HR managers	HR managers lack training in HR management	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Training and development for the HR managers	HR managers lack training in HR management	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022

Create an Action Plan

Identify L&D initiatives to address the gaps and create an action plan that assigns ownership and defines timelines.

This step will systematically walk through the framework and compare it to existing factors in the organization, including:

- Alignment with other HR functions
- Existing programs
- Standard processes
- Learning infrastructure
- L&D team capabilities



Define or update organizational competency frameworks

A competency framework is a **collection of knowledge, skills, attributes, and behaviors required by employees**. Using competency frameworks to define critical behaviors ensures **HR practices are working toward the same goals**.

If your organization **has a competency framework**:

Use the results of your needs analysis and L&D framework to determine whether your existing

competencies are representative of the competencies required for success in your organization. Assess if the competencies are:

- **Relevant** to the work people actually do and to the goals of the organization.
- **Measurable** so that the required behaviors can be assessed against a standardized scale (such as proficiency levels).
- **Something that can be developed** in a person through training, experience, coaching, or other learning interventions.

If your organization **does not have a competency framework**:

Document this as a gap on Tab 6 of the *L&D Strategy Workbook*.

- At a minimum, ensure that core competencies are in place. Leadership and functional competencies can be built on top of this.

See McLean & Company's [*Develop a Comprehensive Competency Framework*](#) blueprint for more guidance.

If a competency framework is not an option, see the following slide for other actions to ensure alignment between HR functions.

Examine other HR programs for integration with the L&D strategy

Ensure alignment between the L&D strategy and other HR programs and functions **to reduce duplication and create synergies.** **Having a competency framework is the best way to achieve this.** If not, review three complementary HR practices for alignment.

Performance Management

- Employees should be evaluated against behaviors (articulated as competencies) that reflect the identified learning needs.
- Consistent language should be used where appropriate to facilitate measurement of behavioral change following participation in a learning intervention.

Total Rewards

- Reward and recognition programs should be designed to encourage and recognize behaviors (articulated as competencies) that reflect the identified learning needs.

Talent Acquisition

- Candidates should be assessed against behaviors (articulated as competencies) that reflect the identified learning needs.
- Recruiters should weave the L&D vision and objectives into communication of the employee brand and value proposition to candidates.

McLean & Company insight

Ensuring HR practices are aligned with the L&D strategy sends consistent messages of behavioral expectations; misalignment **may deter support of the new strategy.**

Review L&D inventory and identify gaps or other required changes

1

Identify current learning offerings that are aligned with the primary learning needs.

Program Gaps

Which prioritized learning needs will need net new content?

2

Evaluate the current offerings against the chosen primary delivery methods and employee groups.

Program Modification

What programs need to be modified to align with the chosen direction?

3

Determine if any existing learning programs should be discontinued to free up resources or prevent conflicting advice.

Program Removal

What learning offering can be discontinued?



Is it worth keeping? Beware the endowment effect!

The endowment effect is a bias whereby **people place greater value on things that they own than is warranted**, and it can impact people's view of programs and processes as well. Be objective about which programs are not aligned against an identified need, and then **evaluate the programs to identify resources (people and budget) that can be redeployed** to a higher-impact activity.

Document any required changes on Tab 6 of the [L&D Strategy Workbook](#).



Identify where current learning infrastructure is not able to support the L&D strategy

Evaluate these **two pillars** against **existing technology & facilities**

Technology



Delivery Method

Can current technology adequately support the chosen deliverable(s)?

- Ability to host content
- Access requirements (e.g. mobile)
- Reporting
- Integration
- Learning path creation
- Individualization

Employee Group(s)

Does the current technology accommodate the learning preferences of the chosen group(s)?

- Interaction preference
- Technology literacy
- Remote support
- Specialized work conditions or environment

Facilities



Is there appropriate space for the chosen deliverable(s)?

- Building and communal learning spaces
- Appropriate technology in learning spaces (e.g. projector)
- Appropriate technology in learners' location (e.g. computer)

Is the space accessible to the chosen group(s)?

- Distance from communal learning spaces
- Remote connection infrastructure

If new technology or facilities are required to deliver on the L&D framework, document the gap(s) on Tab 6 of the [L&D Strategy Workbook](#).



If your current learning management system is insufficient, review McLean & Company's blueprint on LMS selection to [Take an Educated Approach to Developing a Learning Management System Strategy](#).

Determine how the governance model differs from how work currently gets done

While the high-level accountabilities were determined in the previous step, additional work may be required to activate the chosen governance model.

- Building out **these elements will reinforce the chosen governance model, but it can also limit agility**, so decide where they are needed based on the size and culture of your organization.

STANDARD PROCESSES

Standardizing certain processes can provide efficiency (limiting duplication of efforts) and better alignment with strategy (ensuring the right people are involved).

Core Processes to Evaluate

- Requests for new training
- Creation of new L&D programs
- Selection of external partners
- Approval of employee development budget spending

SUPPORTING DOCUMENTATION

Creating supporting documentation can clarify the roles of bodies in the governance model and help them be more efficient.

Documentation to Evaluate

- Council or committee charters
- Prescribed meeting agendas

ROLES & RESPONSIBILITIES

Revisiting roles & responsibilities will ensure employees understand what they are accountable for, and are evaluated and compensated accordingly.

Roles to Evaluate

- Any L&D positions that will have accountabilities added or removed due to the new governance model

Use McLean & Company's [Process Mapping Guide](#) to map standard processes where they are required.



Document required changes as gaps on Tab 6 of the [L&D Strategy Workbook](#).



Assess the function's capability to deliver on the framework


Examine the framework and identified gaps to this point to pinpoint where L&D capabilities will need to be enhanced through training, additional headcount, or strategic partnering with internal and external resources.

Assess capability by reviewing **competency** and **capacity**

The combination of knowledge, skills, attributes, and behaviors required

The amount of resources available including people, time, and budget

Learning needs	Is there sufficient subject matter knowledge of the learning needs? Is there additional budget and resources to address them?
Employee group(s)	Is the size of the targeted group(s) too large for the current team to support?
Delivery method(s)	Are new skills required to work with the selected method(s)? Can current resources (time and budget) be shifted?
Measurement	Is there sufficient data literacy to collect and analyze required data? Does someone on the team have time to oversee this?
Governance	If L&D team members are being empowered to make decisions, do they need training? Is training required for new decision-making processes?
Inventory	Are L&D team members able to develop required programs in the method selected? Is the gap between the required learning initiatives and what exists too large for the team to fill?
Learning infrastructure	Do new technologies require new skills or knowledge to leverage successfully? Is additional headcount or budget required to select and implement these tools?

Document the gap(s) on Tab 6 of the [L&D Strategy Workbook](#). 

Prioritize gaps to identify where action will have the greatest impact

Effort

Identify any **required investments, additional HR capabilities, or any current processes/practices that need to be modified.**

When assessing the required efforts, be sure to **include HR stakeholders.** They have the best insight into the effort required.

Assign each gap an **effort level:**

- **Low effort:** Minimal additional resources required; the L&D department has the capability to take on the initiative.
- **Moderate effort:** Some investment required; some HR capabilities need to be built.
- **High effort:** Investment is required, significant HR capabilities need to be developed, and new processes and programs need to be created and implemented.

Impact

Start broadly and **determine if/how a gap will impact a strategic objective** and associated metrics.

Evaluate **how important it is to achieve an objective**, if other initiatives depend on it, and the visibility of the outcome within the organization.

Assign each initiative an **impact level:**

- **Low impact:** Addressing the gap will slightly or indirectly help achieve an L&D objective, and it isn't a prerequisite for addressing other gaps.
- **Moderate impact:** Addressing the gap helps achieve an objective or is required for another gap that will.
- **High impact:** Achievement of an objective relies on closing the gap.

Use Tab 6 of the *L&D Strategy Workbook* to assess the effort and impact of all identified gaps to help select where action will have the greatest impact.



Create a roadmap of strategic L&D action items

Identify priority action items.

- Identify high-level action items required to close priority gaps.
 - Is there any evaluation or analysis to be completed to establish feasibility?
 - Does a business case need to be created and approved?
 - Is there training or hiring required?
 - Are new programs required?
 - Do certain processes require modification?
- Keep the action items high level by focusing on the deliverable they will achieve.

Example

Gap

- Technology doesn't support delivery method(s)

Action Items

- Define requirements for new technology solution
- Create a business case and get approval
- Select and implement new solutions

A Gantt chart is a simple tool to visualize and communicate your action plan.

- However, various other methods like a priority list may be ideal for your organization.
- The key is to **create a simple visualization that will help with approval and communication** of the strategy as well as updates on progress.
- Regardless of the tool, ensure each action item has an assigned owner and targeted start and end date.

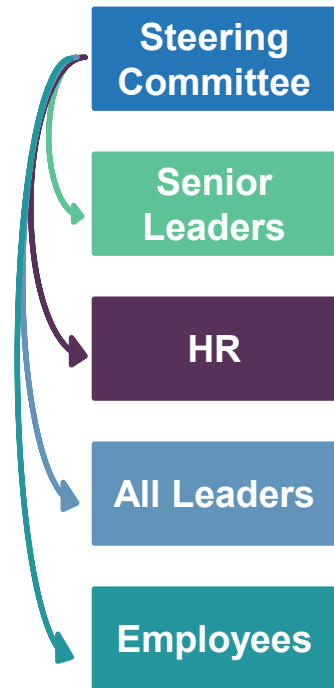


Create and visualize your roadmap using Tabs 8 and 9 of the [L&D Strategy Workbook](#).



Communicate L&D strategy and action plan

Keep your audience in mind as you communicate your L&D strategy and action plan, and **continuously emphasize the value** each audience can expect to gain. The L&D strategy must be **broadly communicated** to ensure that stakeholders understand, buy into, and act in accordance with it.



Follow communication best practices. Ensure that communication is:

Timely

- Provide warning before the implementation of any changes, whenever possible.
- Communicate as soon as possible after decisions have been made and frequently to mitigate rumors.

Open and honest

- Ensure that the information is truthful.
- Be transparent; this is critical.
- Don't be afraid to say that you don't know if asked a question you can't answer.

Two-way

- Incorporate feedback loops into communication efforts and invite stakeholder input.
- Follow up on any questions that are asked.

Consistent

- Communicate through multiple mediums, as people absorb information differently.
- Ensure that messaging is consistent across departments, mediums, and presenters.

McLean & Company insight

The process of creating an L&D strategy **positions the function as a strategic partner focused on enabling the achievement of organizational objectives**. Don't miss the opportunity to champion the effort and share the success stories (and metrics!) that will come from this **alignment to the organizational strategy**.



KEY INSIGHTS

- The rapid pace of change has amplified the need to identify and develop new competencies that will be required from employees. **L&D can't be all things to all people, and instead needs to focus on proactively identifying and developing the critical learning needs** that will enable the organization to deliver on its strategic objectives.
- **There is no shortcut for a rigorous and planful needs analysis.** While it would be easier to skip the time-consuming phase of gathering information from stakeholders, **the L&D strategy needs to be grounded in a solid understanding of the organizational objectives** and the potential obstacles to achieving them.
- It is important to listen and involve key stakeholders, but **the L&D framework should reflect a realistic vision of the function** aligned with the strategic objectives of the organization, **rather than address everyone's needs.**
- **Align HR practices with the L&D strategy to send consistent messages** of behavioral expectations; misalignment **may deter support of the new strategy.**
- The process of creating an L&D strategy positions the function as a **strategic partner focused on enabling the achievement of organizational objectives.** Don't miss the opportunity to **champion the effort and share the success stories (and metrics!)** that will come from alignment to the organizational strategy.

WORKSHOP OVERVIEW

Onsite we will...

	DAY 1	DAY 2	DAY 3
ACTIVITIES	L&D team Functional leaders/SMEs <ul style="list-style-type: none"> Clarify the strategic direction of the organization Conduct SWOT analysis Identify insights for learning Create a vision for L&D Define L&D objectives and identify strategic metrics 	L&D team <ul style="list-style-type: none"> Identify the primary learning needs Prioritize the primary learning needs Identify employee groups and create learner profiles Select core delivery methods Outline a measurement approach for standardized evaluation Create a governance map 	L&D team <ul style="list-style-type: none"> Examine integration with other HR practices Identify gaps in L&D portfolio Examine learning infrastructure Assess L&D capability Prioritize gaps Create an action plan
DELIVERABLES	<ul style="list-style-type: none"> L&D Strategy Presentation Template L&D Strategy Workbook 	<ul style="list-style-type: none"> L&D Strategy Presentation Template L&D Strategy Workbook Learner Profile Template 	<ul style="list-style-type: none"> L&D Strategy Workbook L&D Strategy Presentation Template

WORKSHOP OVERVIEW

Pre-work: Client data gathering and planning

McLean & Company Analysts & Client

- Discuss participants, logistics, overview of workshop activities

Client

- Form an L&D steering committee
- Collect organizational information including:
 - Mission, vision, and values statements
 - Organizational strategy documents
 - Culture statements
 - Talent data (performance management, succession planning, engagement, etc.)
 - Diagnostic survey data, if it exists, including: HRSM, Engagement, New Hire, and Exit
- Conduct interviews with key stakeholders to clarify strategic objectives and challenges *
- Conduct employee focus groups to verify challenges and understand learning needs *
- Complete L&D initiative inventory

Post-work: Implementation supported through analyst calls

McLean & Company Analysts & Client

- Discuss action plan items and prioritize blueprints for identified L&D initiatives

Client

- Execute projects required to complete the action plan

* Ask us how we can accelerate your pre-work

MCLEAN & COMPANY OFFERS VARIOUS LEVELS OF SUPPORT TO BEST SUIT YOUR NEEDS

DIY TOOLKIT



“Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful.”

GUIDED IMPLEMENTATION



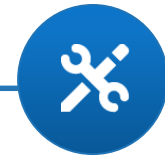
“Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track.”

WORKSHOP



“We need to hit the ground running and get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place.”

CONSULTING



“Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project.”

Diagnostics and consistent frameworks used throughout all four options



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Build an evidence-based HR strategy while gathering insights throughout the employee lifecycle.

LEVERAGE FEEDBACK TO DRIVE PERFORMANCE

Identify impactful initiatives using our diagnostic programs to collect feedback from employees, stakeholders, and the HR team.



Optimize the HR Department for success

HR Stakeholder Management Survey

Align HR initiatives with business strategy and stakeholder needs.

HR Management & Governance

Improve HR's core functions and drive project success.



Improve employee experience and HR processes

New Hire Survey

Ensure recruiting and onboarding programs are effective by surveying new employees.

Employee Engagement

Move beyond measuring job satisfaction with a comprehensive view of engagement.

McLean Employee Experience Monitor

Evolve to leader-driven engagement with a real-time dashboard and results.

Employee Exit Survey

Understand why people leave the organization in order to proactively retain top talent.

360 Degree Feedback

Empower employees with a holistic view of their performance to prioritize development.

View our [diagnostic programs](#) for more information.



McLean & Company is a research and advisory firm providing practical solutions to human resources challenges via executable research, tools, and advice that have a clear and measurable impact on your business.

Our research team uses a rigorous research process to identify and hone best practices; create practical tools, templates, and policies; and supply clients with the insight and guidance of our subject matter experts. McLean & Company applies this proven research approach to both human resources and company management teams, creating complete solutions that supply the tools you need to get each project done right.

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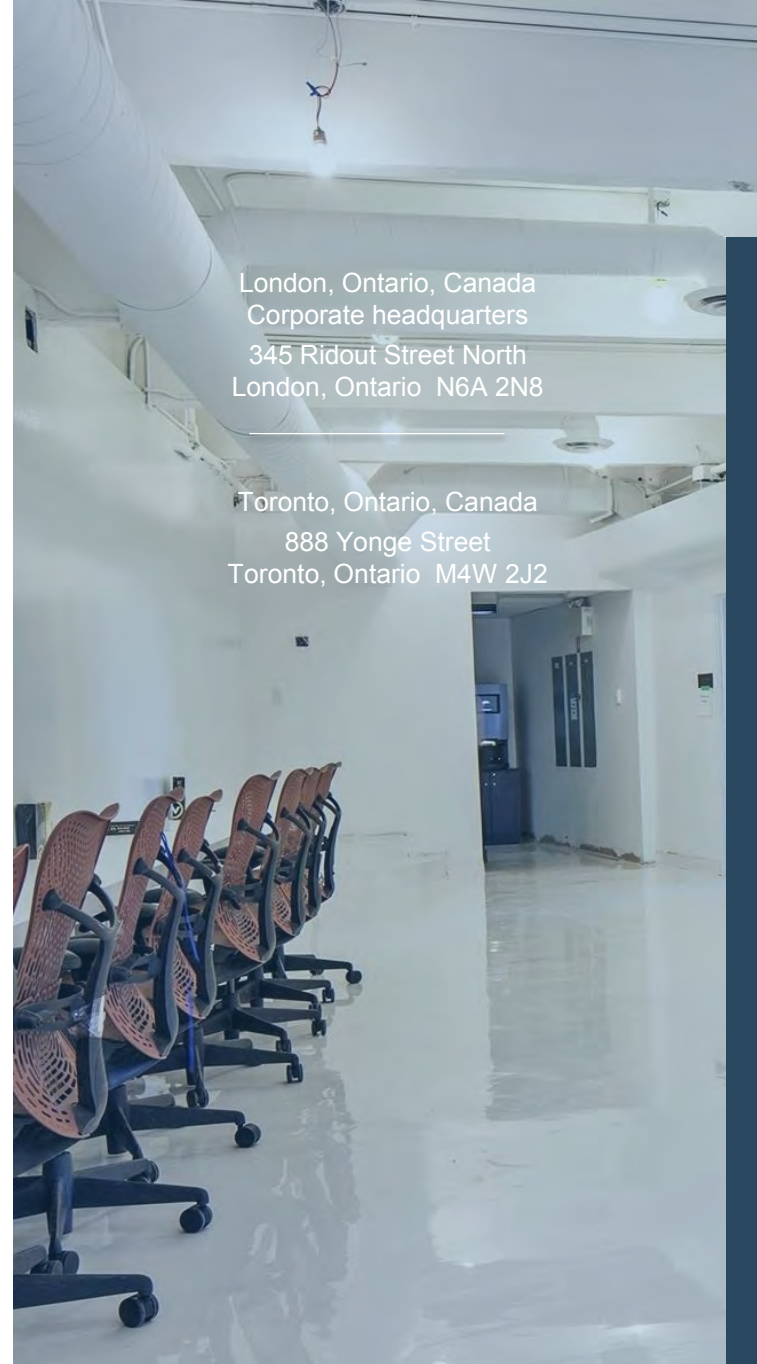
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APPENDICES

Choose a method to determine the business impact of the L&D strategy

One of these three methodologies* will allow the actual impact of L&D on the strategic metrics to be **determined**. Even if these aren't used, identifying those metrics still has value in helping to communicate the desired impact of the L&D strategy.

Trending

Compare business performance before and after implementation of the strategy. This works best **when there are limited other factors that are expected to influence the metrics** being measured.



Every department is capable of this method.

Control Group

Use a **control group** to isolate the impact of the strategy. If possible, the two groups should share as many characteristics as possible (e.g. rather than compare two divisions, provide the training to half of the leaders in each division). Often a **pilot group can be used** to assess the impact.

Participant Estimation

Determine the **monetary value of changes to business metrics** (usually this conversion has already been done) and then **ask participants to estimate the amount of change that they attribute to the program**. Finally, **ask them to estimate their confidence in the degree of impact** and combine this information to determine the financial impact of the program.

Example of Participant Estimation Methodology:

Metric	Change	Monetary Value	% Attributed to Program	Confidence	Impact
Customer Retention	+ 4%	\$1,000,000	20%	70%	$\begin{array}{r} \$1,000,000 \\ \times 0.2 \\ \hline \$ 140,000 \end{array}$

*Based on materials published by ROI Institute.

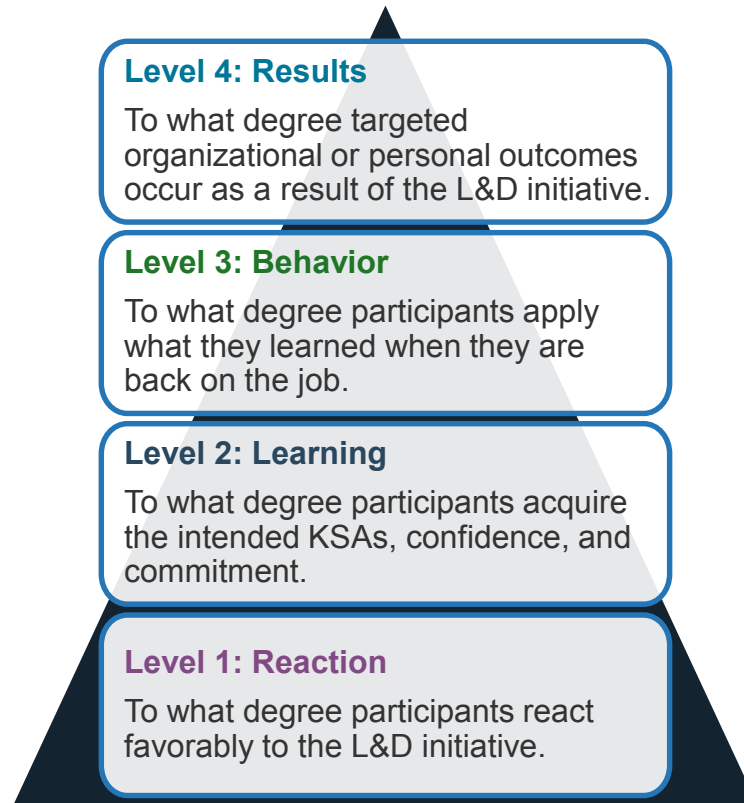
Focus Group Guide questions for stakeholders

Customize the [Standard Focus Group Guide](#) using a selection of the questions below to help conduct focus groups with different stakeholders.

Questions	Purpose and Comments
Have you experienced any L&D activities in this organization that have helped you in achieving your business goals? Any that were not helpful?	Identify existing L&D activities in the organization that are effective and those that are not.
Is there anything missing from the current L&D offerings that could help you perform your role better?	Identify areas of weakness that the L&D strategy should focus on.
How did you learn the skills to complete the required tasks in your current role?	Identify how knowledge is transferred in the organization.
What challenges are you currently facing in your role?	Identify opportunity areas for focus in the L&D strategy.
What skill or competency gaps do you see that are impacting the organization?	Prioritize resources toward competencies that require the most development.
How do you like to learn (online, instructor led, etc.)? How do others on your team like to learn?	Use learner preference information to inform the way L&D content is delivered.

Kirkpatrick's Learning Evaluation Model

Measuring L&D Effectiveness



J. Kirkpatrick & W. Kirkpatrick



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