LOOK AHEAD:
Long-Range Learning Plans

Faced with an unsteady economy and fluctuating learning needs, planning a learning strategy designed to last longer than the next six months can be a tall order. But a long-range learning plan can provide a road map for success.

BY MARGERY WEINSTEIN
hances are some of you are still unclear on exactly what your learning and development budget for 2011 will look like. For those of you who know the numbers, other blanks likely still need to be filled in, such as the specific curriculum that will be rolled out for new programs, the learning materials that will be needed, and job roles that may be added in the coming year, which you and your colleagues will need to support. But some companies can rest easy, knowing their learning plan for next year is part of a long-term strategy. These companies are betting a clearer picture of what’s coming their way will mean clearer bottom-line results in 2011, and beyond.

**STRUCTURED FOR STRATEGY**

KPMG LLP, a global network of professional services firms, knows a thing or two about long-range learning plans. It’s a part of the organization’s culture. “The firm’s senior leadership defines the goals and strategies for the company for a multi-year period, and provides direction on the role of our training organization in achieving these goals through annual discussions,” says Cyndi Bruce, executive director, Center for Learning and Development (CLD). Bruce says the firm’s approach to planning for training needs is structured and deliberate. The process begins with a Training Advisory Board, composed of KPMG’s senior leadership, along with other partners and experienced leaders. “The board reviews proposed training against the firm’s strategic objectives, and makes recommendations to ensure our training is relevant, timely, and aligns with our business priorities,” Bruce explains.

Another facet of creating a long-term plan at KPMG is for the learning team to work directly with individual business units. “We work with our service line leadership or training councils in each of our business areas—Audit, Tax, Advisory—as well as our infrastructure departments such as IT, F&A, etc.—which provide us with direct input and insights into the current business environments, and provide guidance on the development needs of their constituencies, and help define the curricula,” Bruce points out. “The leaders of our business functions often personally keynote national programs and help set the tone for training and development sessions.”

Since planning learning technology rollouts and updates can be tricky, KPMG has a formalized process for anticipating those needs. “We have developed a learning technology road map that enables us to continually monitor and evaluate our current effectiveness and project future needs,” says Bruce. “We can adjust or update the road map accordingly as client needs change, or to align with our strategic direction,” she explains. “Our learning technology group stays abreast of industry trends, new technology, and new delivery methods through participation in a variety of user groups, conferences, best practice sharing with external colleagues, and through collaborative vendor relationships.”

Understanding the customers or clients you serve is a good first step to attaining a reliable strategic learning plan, says Bruce. “Understanding how your business responds to client needs, and aligning training strategies with your business priorities,” she says, “will go a long way toward identifying the areas you need to focus on and ensuring your long-term learning strategy is on target.”

**KEYED INTO COMPETENCIES**

At used car retailer CarMax, talent management strategic goals generally are defined two to three years out. But specific strategies to achieve the learning goals are more closely defined annually, says Sean Ramage, director of Talent Management. “Job-related skills training is more likely to be determined and requested on an annual basis by specific functional areas,” he says. “The planning is conducted in partnership with business leaders, and is based on competency and technical skills needs as
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determined through assessment data.”

Indeed, getting a handle on the skills its employees most need to succeed is an essential part of long-term learning strategy at CarMax. As the company looks forward to the next five years of training programming, it already is thinking about the skills its workforce most needs to develop to support company performance. “Our company has put a strong emphasis on the importance of core competencies that drive behavior, which, in turn, drives performance. Based on our short- and long-term goals, we partner with company leadership to put together programs that support the competency needs/gaps that drive the desired performance goals,” says Ramage. In addition, CarMax stays in direct contact with its employees to get their input on what they think they need to do their jobs better. “We survey our associates and managers to determine what they specifically need to accomplish their objectives and improve performance,” Ramage explains. That survey data then is combined with assessment data from performance reviews and management assessment programs, among other sources. “This balanced mix of strategy,” he says, “ties to competencies and business objectives, and promotes a true continuous learning process for our company.”

As important as closely monitoring your company’s internal environment is, it’s not the whole story when it comes to formulating a strategic learning plan—at least not at CarMax. “We closely monitor trends not only in the fields of talent management and human resources, but also what’s going on in society, as well,” says Ramage. That outside observation recently led the company to incorporate social networking into its learning regimen. Ramage notes, “We continue to keep our fingers on the pulse of emerging technology to provide the right intuitive tools to assist our associates in the development they need to excel at their roles.”

QUICK TIPS

Figuring out what you—and your bosses—want to do next year, let alone in five years, may seem impossible given the number of unknowns you’re working with, but there are ways of taking a stab at it. Molly Scholes, senior director of consulting services for learning vendor SkillSoft, offers her top tips for hammering out a long-term learning plan:

“It’s never too late to begin planning a learning strategy. Ideally, a company’s learning strategy mirrors the strategy and objectives set for the overall enterprise. For example, if an organization communicates a three- to-five-year business plan to its employees and customers, the learning strategy should be aligned to the same timeline, goals, and objectives. Plans may change over time, so reviewing the strategy at regular intervals is helpful to keep focused on the most important priorities.

Executives and training directors from all levels and areas of the enterprise should be involved in the process of setting a learning strategy. It should be a collaborative process so there is buy-in and support throughout the organization. While executives and training directors are key influencers, a direct manager or supervisor’s support for learning ultimately will set the tone for learning in the organization.

When a company is considering priorities for its learning programs over the next one to five years, the organization should understand and examine its business drivers. The need for learning solutions doesn’t emerge by itself. Learning solutions arise when a specific business driver calls for a behavior modification. Typically, behavior change is articulated as a skill set or competency. The business situations that call for those skills and competencies might include: decreasing expenses, improving customer satisfaction, or increasing employee morale.

A learning strategy miscalculation some organizations make is to assume, “if we build it, they will come.” A learning strategy isn’t complete when a learning management system is launched, or a new program is communicated. A successful learning strategy encompasses an ongoing process of understanding the business context, setting goals, execution, measurement, and evaluation. Another common area organizations neglect is marketing their learning strategy and resources. An effective marketing strategy extends far beyond the launch of a system or program, and is a continuous process with frequent and targeted messages to employees.

If a company is struggling with how to plan a long-term learning strategy, it can be helpful to network with other like-minded organizations and learning professionals. Networking opportunities at regional user groups, LinkedIn groups, Webinars, and industry events (such as Training 2011 Conference & Expo, held February 7 to 9 in San Diego; www.trainingconference.com) can be a powerful way to connect with others in your shoes and share common challenges and goals.

PRIMED FOR PLANNING

DPR Construction’s top learning and development considerations focus on its overall learning mission, which is: “We create and provide learning opportunities to enhance the potential of our employees in support of our business objectives,” says Director of People Practices Cari Williams. “Our initial planning session for the next calendar year takes place in the fall (October/November).” DPR’s Global Learning Group (GLG), individuals from different offices and roles who focus on training initiatives, discusses “initiatives and areas of focus for members of our learning team.”

“The content of our planning sessions revolves around the business strategies that are outlined by regional management, as well as our own training needs assessments conducted across the organization,” Williams explains. “We focus on everything from operations best practices to IT initiatives to professional development opportunities.” Planning sessions at DPR typically involve more than 50 key stakeholders across the company, and include company leaders and others in a variety of roles and levels of influence, says Williams. The DPR training team then presents a summary of its conversations and strategy to the Management Committee, which oversees operations across DPR. As training needs and initiatives are identified and agreed on, Williams says she and her colleagues enlist the help of subject matter experts to assist with the development, delivery, and organization of new initiatives.

The GLG also takes into account the feedback and input of DPR’s employees when strategizing for future training initiatives. “We recently created a survey that we sent out to the entire
company to gauge interest in the multiple ways we could infuse technology into training, especially focusing on e-learning,” says Williams. “We provided a list of courses and asked participants to select the ones they prefer as classroom-based and which ones could be better presented via e-learning. We received 272 responses: Some 80 percent of respondents believe instructor-led training has been most effective in the past, and 66 percent suggest it is the best method for future training.”

GEARED FOR GOVERNANCE
Tom Clancy, vice president of Education Services at information technology company EMC Corp., firmly believes governance must be a critical component of any learning strategy. As such, in 2008-2009, EMC implemented a governance structure to prioritize strategic training investments and engage executive stakeholders. “The Executive Steering committee aligns the enterprise learning strategy with the corporate strategy and business plans, and engages the executives who control budget and priorities,” explains Clancy. “Two business executives chair the committee; the team reviews and approves the annual learning plan and oversees implementation.”

Simultaneously, functional executives and learning representatives participate on learning councils for each audience. They collaboratively plan, implement, and inspect programs to maximize readiness and productivity, Clancy says. “Their planning horizon is typically six months, and they identify what new skills are needed in the field for sales and services, as well as ‘more of’ skills. They drive participation and consistent execution of global readiness programs (Sales Accreditation, Global Services certification, etc.).”

EMC’s learning strategy is all about aligning with the skill requirements of the business, Clancy emphasizes. When deciding what is most needed in learning programming over the next one to five years, “we examine what skills are needed to execute our business vision and strategy: e.g., sell, architect/design, implement, manage, support in light of our technology road map (virtualization, cloud computing, etc.),” Clancy explains. “We determine how to best integrate and leverage the skills resulting from our 40-plus acquisitions over seven-plus years. We also instituted a global Organization & Talent Review (OTR), which is critical in determining needs. OTR collaborates with the business to define our talent requirements. Specific goals are set through workforce planning processes and OTR.”

On the learning technology front, “our business strategy demands, and our customers expect, learning that is agile, scalable, social, immersive, personalized, and mobile,” Clancy says, “so we need to continue to identify the technology to support these criteria, as well as push the envelope of how we enable learning to all of our employees across the globe.”