

A Zeroed-In Technologies White Paper

Getting and Keeping a Seat at the Table

*Aligning and demonstrating measurable business value
through learning*



Table of Contents

Forward	3
Why it's Important to have a Seat at the Table	4
Getting a Seat at the Table	4
Getting a Seat at the Table: Where to Start	6
Keeping a Seat at the Table	8
In Summary	11
About the Author	13

Foreword

From the Desk of Chris Moore...

In my 20 years designing and developing management tools for learning executives, one constant I have observed is the ongoing quest to get the learning function on the same footing as Operations, Finance, Marketing and other key organizational functions. CLOs know their success hinges on being in on the upfront planning for the organization's initiatives that require learning to enable success. And, that means being in on the executive strategy meetings where decisions get made on which initiatives to pursue.

Having a seat 'at the table' during these meetings with other company executives helps the CLO in every way. The CLO's mere presence at these meetings communicates to everybody that learning is strategic and is a de facto part of initiatives the executive puts forth. Having learning represented as the plans are crafted lets the CLO make sure everybody understands what learning can (and can not) accomplish and what realistic timelines and budgets need to look like to enable the people who will drive each initiative. Some executive teams include an EVP of HR 'at the table' and, while that's better than no voice at all, this only helps the CLO and his mission if that HR executive can speak to the details of learning's role, something many HR executives can't do well.

So, how do you get a seat at the table? You're making a good start by reading this paper! It contains thoughts and ideas to help any learning manager get in on the meetings where strategic decisions are made and initiatives you'll need to support are mapped out. Also check out our website at www.getzeroedin.com for additional resources – articles, case studies and more – to learn how other organizations are measuring and managing their learning efforts to prove the value they add to organizational results.

As always we'd like to hear from you. Please write me at cmoore@getzeroedin.com and let me know how the ideas in this paper work for you in getting and keeping a seat at the table in your organization.

Why it's Important to Have a Seat at the Table

In which scenario would you rather find yourself?

Scenario A - The COO plops a thick planning document on your desk along with the encouraging words "I know your team will be up to supporting these new product roll-outs next month."

Scenario B - You, in the executive meeting where a major product redesign is being voted on, point out the real retraining time and costs required to support the product re-launch. Your resource estimates take into consideration an FTE level and other resources that had not previously been part of the discussion.

Of course you want Scenario B, because when learning has a seat at the table where the decisions are made, commitments to support key initiatives are more likely to be realistic and achievable. And, what happens when learning delivers on its commitments? Executives notice. Executives start to 'get it'. They begin to realize that including learning as part of overall initiative planning is part and parcel to how the organization plans and executes. When executives start to respect learning, line managers down the ranks do the same, making it easier for learning to further embed itself in the planning phases of projects that require learning to be successful.

If learning isn't at the table when key initiatives are planned, odds are not good that the organization will get the resources and time necessary to successfully enable the projects. So, learning support for initiatives is either too skimpy or takes too long to deliver, or both, disappointing stakeholders and setting off much finger pointing. And, this is how too many CLOs get set up to fail in their missions, because executives either don't respect the time and effort required for the learning function to properly provide support, or don't respect the CLO or his staff professionally, or both. And why is that?

Getting a Seat at the Table

Too many learning professionals today still don't really understand the businesses for which they work. Kaye Foster-Cheek, VP of HR for Johnson & Johnson was quoted recently in *Workforce Management* remarking "what we have spent a lot of time in HR doing is being business partners. We don't just say that as jargon. That means we need to understand how our business makes

money. The first thing I ask my HR professionals is, "Do you know how your business makes money? What are the levers that your business leaders can pull to really affect those outcomes? Do you understand how that all works?" Because if you do, then as a person who is working on maximizing human capital, you understand how that actually affects the business outcome. If you don't understand how the business makes money, then you can't be relevant."

Learning professionals lacking industry knowledge and business experience can't 'talk the talk' and aren't able to hold their own in conversations with management. Predictably, management puts off dealing with 'Training' until after key plans have been laid. Then learning's role gets bolted on after the fact, and learning gets told 'this is the launch date, make it work'. No one wants the responsibility to teach staff of the learning organization the details of the business. Management often has the least available time and patience to try to do so.

Use the following ideas to help your learning professionals really know and be able to talk about your organization's business.

1. Ask management stakeholders which learning unit staff need to know more about how your organization does business. (Your staffers will be more open to pursuing professional development in the suggested areas if they know the impetus for it is coming from their own customers.) Organize the feedback and create developmental opportunities that are based on what each staff person needs to learn to become more relevant with their stakeholders.

For example, your performance consultant likely needs a much deeper dive into a functional area of the business than does your LMS manager. So, development activity for your consultant should involve both a broader and deeper interaction, sufficient that the workings of the business are conveyed and understood.

2. For staffers who need a lot of exposure to the business, embed them in the functional area or business unit where their stakeholders work. Short of marriage, nothing pairs people together for longer periods of time than sharing an office space day after day. Just like increased time on task improves outcomes, increased time in the trenches with stakeholders improves understanding of how their business works and what help is needed to improve performance.

3. Where it's not practical or necessary to physically embed staff within a business unit, look to leverage and extend existing contacts with that unit's management. For example, when creating learning content for that business unit, take video of subject matter experts describing details of their work, and make that video and the subsequently produced learning material available to the rest of the learning staff as mandatory professional development material.
4. If there's too little interaction between your staffers and their customers, and thus too few opportunities for staff to informally learn about the businesses they serve, then get creative in inviting key customers to meet with learning staff to describe and discuss what they do. Make it easy on customers by offering to meet with them on their schedule – early in the morning or at the end of the day or anytime in between. If management is physically separate from the learning staff, use your online meeting tools to bring these managers and your people together.
5. Meet with line managers to discuss their performance appraisal process, and to understand what the key drivers of success are for their staff and business unit. Ask them what knowledge, skills and abilities (KSAs) a staffer needs to excel. Ask if the resources available are enforcing those KSAs. Determine together where reinforcement needs to be made. Identify metrics that best show learning's contribution to their success and discuss how and where learning's efforts can influence those metrics.
6. Underlying all of the above is the need for the learning staff to get out of their offices and routinely spend time with the people in the business units they support. See first hand how the products and services are researched, developed, produced, distributed, sold and supported. Learn the language of each business unit - how they think about, talk about and do their work. Hear directly from employees on what the barriers to better performance are in their jobs, and what their ideas are on removing those barriers.

The seats at the executive table are filled with business people that manage business people. To get a seat, you must prove that you are one of them!

Getting a Seat at the Table: Where to Start

Learning's not a dumping ground. First, raise the hiring standards for the learning function to include a requirement that people have sufficient business

acumen, or, for junior hires, have the capacity to quickly acquire a thorough understanding of the business. Use this standard to screen out and keep out poor performers whom the business units from time to time try to dump into your learning group. Professional credentials, successful work experience and functional expertise earn a rotation in the learning group, nothing less.

Accounting knows best. Meet with your Finance & Accounting group and ask them where the out-of-line costs are in the business - the accountants will know this – and ask their opinions of what needs to change and who to work with in the organization to get those costs in line with business plans. Then be proactive with those business units to discuss and determine if learning can help better control costs. If the answer is yes, then negotiate and implement an appropriate initiative to do just that, with stakeholder backing direct from Finance or, even better, the CFO herself.

Work where the money is. Over time, where executive management spends money reveals what an organization's priorities really are. Similarly mapping learning resources to support those priorities is usually a smart way to operate.

For instance, do you work for a sales- driven organization, driven by a well funded sales team? Then, one of your focuses needs to be an understanding of all the elements of their sales cycle, to then understand the role sales training needs to play to best support Sales in efficiently closing deals that maximize profits for the organization.

Does your organization compete in a heavily regulated industry? Then you need to get with the compliance people to understand who the regulatory agencies are and what reporting they require, what needs to be done to get and keep the organization fully in compliance, and where the shortcomings exist in the current compliance effort and what must be done to correct the problems.

Is workplace safety crucial to success for your organization? If so then get with the safety people to understand where accidents are occurring and safety violations continue to occur – and what can be done to fix these problems and what learning's role should be in enabling the fix.

Push organizational financial literacy. A VP & CLO at a Fortune 100 manufacturing company notes that the best way to increase the financial acumen of your staff is to actually develop a program to increase the financial acumen of all employees. "Executive management is interested in increasing employee understanding of how the company makes money" notes the CLO,

"they care about it and see it as really impacting the capabilities of the workforce. Driving financial literacy had the double benefit for us of our learning team learning about financials while building the content for the program".

Suppress the whining. Even as you're doing all of the above, it's likely that getting to the table won't happen overnight. Building a good reputation with management usually takes some time. While that is happening, consistently remind your learning staff that better times are coming. Whining now about unrealistic project timeframes or budgets turns stakeholders off and won't increase the speed with which you get to the table. Encourage your staff to look and think ahead to spot stakeholders' future needs and to be pro-active where possible so Learning has a better shot at getting realistic resources to do its job.

Keeping a Seat at the Table

Just like all other executives, once at the table, you have to continually prove your value in order to stay at the table. And the best way to keep your seat is to provide ongoing proof of learning's contribution to business results, and do so in language that management understands.

Here's how to give it to them: Key functions in your organization already use business measures to chart their progress relative to the annual strategic plan. For example, your Sales group measures new business deals, contract renewals, new product sales vs. existing product sales, revenues by product by rep and by region, and much more. Learning's job is to define and monitor corresponding learning measures that enable performance by the business functions, and in doing make those business measures meaningful.

One of the best ways to do this is to create scorecards for each of the supported business functions. A scorecard articulates your targeted learning strategy for the business function and the key measures that will show progress in accomplishing the strategy. A well thought-out scorecard shows your stakeholders why the selected measures are important by setting them in the context of your strategy. Mapping out each strategy for the business unit in terms of high level goals and objectives provides a platform from which to measure your success. The strategy sets expectations with your peers at the table and shows them that you're willing to be accountable to drive the key measures in the right direction toward agreed upon targets. As Learning goes about its job of executing the strategy, your internal managers may focus on the specific key measures and the work they produce to influence them, but your stakeholders and colleagues at

the table will be more interested in the designated outcomes measured by the key learning indicators on your scorecard.

Let's illustrate this using the Sales function, specifically the readying of new sales reps to be 'street ready' – to be able to sell their assigned products on their own. Here Learning's role is to enable new sales reps to acquire a sufficient amount of product knowledge and selling skills to be able to start selling – and to make this happen in the least amount of time and most efficient manner possible. With data taken from your learning management system and perhaps other data repositories, the corresponding key learning indicators and subordinate key measures for a Sales Street Ready scorecard might include:

'Street Ready' Speed	'Street Ready' Efficiency	'Street Ready' Impact
<ul style="list-style-type: none"> ⊕ Average days for new sales reps to graduate to 'street ready' ⊕ Confidence level of new sales reps at graduation ⊕ First time pass rate 	<ul style="list-style-type: none"> ⊕ Average training investment per new sales rep ⊕ Quality index rating for 'street ready' program ⊕ Voluntary and involuntary drop out rates during training 	<ul style="list-style-type: none"> ⊕ Average days for new sales rep to close 1st deal ⊕ Average days for new sales rep to attain year one quota ⊕ Voluntary and involuntary attrition rates of new sales reps during year one

Key learning indicators (e.g. Speed, Efficiency, and Impact) describe and measure business outcomes enabled through learning and process. They normalize and aggregate a series of multi-unit measures (e.g. dollars, percentages, counts, ratios, etc.) into a common percentage unit called attainment by calculating how close the actual value for a given measure is to its stated target. Attainment is a time-based calculation which also applies weightings for importance during the aggregation process.

Attainment reflects the percentage towards success (0 to 100%) of how Learning is accomplishing the strategy. Attainment scores are commonly depicted with stop-light style colors making the visualization of progress and potential risks quick and simple. For instance, if the attainment score falls within a given range it may show as red (at risk), yellow (needs discussion), or green (on target). If

an indicator is reporting as red or yellow then you've got the underlying details, the measures, the work plans, and most importantly the insight to take action to bring things back on target before you have to present progress to your stakeholders.

Figure 1 presents a model that uses a scorecard measurement framework to define the right measures for your situation based on your specific learning strategy and initiatives.

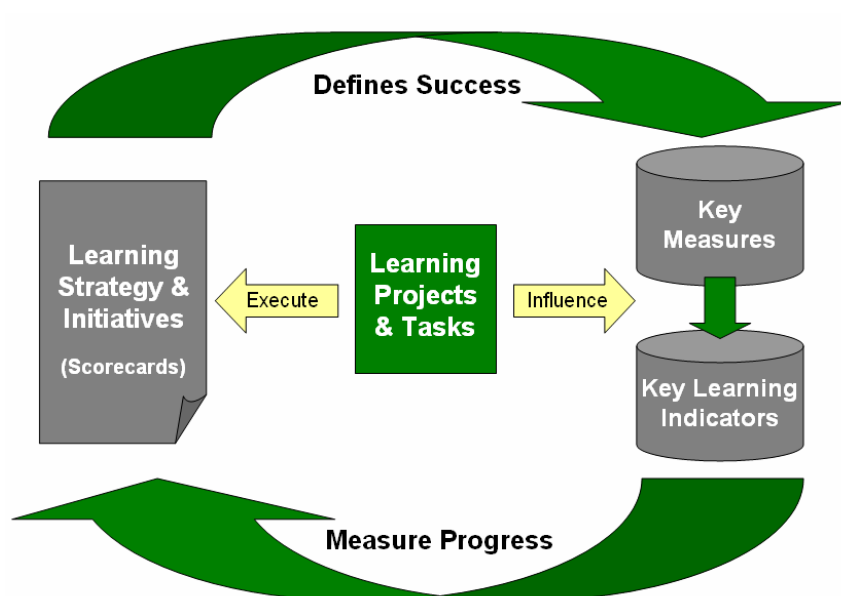


Figure 1 – Model to define learning's success metrics and measure your progress

Using this model, learning strategies and initiatives are articulated in terms of their high level goals. These outcome-oriented goals get further broken down into objective-level enabling strategies. The objectives define what must be accomplished in order to realize the goal. Each objective correlates to one or more key measures, a quantifiable metric that shows progress in accomplishing each objective-level strategy. Using the attainment formula described previously, the key measure attainment of specified targets aggregate into key learning indicators that not only describe the outcome of each goal but in effect measure the progress of goal attainment. Together all key learning indicators on the scorecard reflect the health and soundness of the strategy in question.

To help you think through what corresponding key learning indicators might look like for some of the functions you likely support in your organization, see our report entitled "Seven Key Learning Indicators your CEO Really Needs to Know", available at <http://www.getzeroedin.com>.

And if you're wondering what the seven key learning indicators are ...

1. Operational Excellence
2. Learning Effectiveness
3. Compliance
4. Time to Competency
5. Change Readiness
6. Workforce Productivity
7. Point of Engagement

This uniform set of key learning indicators provides Learning with a set of guidelines from which to measure impact on the business. But let your business strategy guide your learning strategy. Construct a series of indicators that best reflect the outcomes desired from the learning strategy's successful execution. The key learning indicator is not only a metric, it's a descriptor of impact and enablement through learning.

In Summary

Determining the impact of learning has become increasingly important because learning today is viewed as a business service, not an HR process. Most reporting on learning impact isn't done for HR's sake, but instead for stakeholders in the lines of business who want more granular measurement on the value learning adds to improving performance.

Help your own cause by trumpeting to stakeholders every significant learning success story you have. To make these success stories resonate with management, they need to contain metrics that quantify the business success of the initiative that learning enabled.

Success stories spring from enabling the right organizational initiatives in the right way. And this happens when learning's activities are aligned with the business initiatives. A best practice to ensure alignment is to create an annual business plan that maps learning support to the business's initiatives. Giving executives and their key line managers a seat at 'learning's table' for an alignment exercise is an opportunity to show management some of the deeper details behind learning's work. Monthly or quarterly checks on the annual business plan ensure Learning stays current with the needs of the business.

It is true that factors beyond learning – general economic and industry conditions and others –also influence business outcomes. It is also true that other factors influence learning outcomes, such as experience levels of the learners and the quality of the instruction. So Learning can't take all the credit when the business succeeds, but it certainly shouldn't take all the blame if it doesn't. But armed with your scorecard and information from your corresponding key measures, you can show the progress and impact learning is having on business outcomes. And you'll show this impact secure in your seat at the table.

About the Author – Chris Moore is president of Zeroed-In Technologies, an innovative learning technology company, and creator of the award-winning CLO Dashboard™, a learning and performance measurement dashboard that aligns, measures, and monitors learning and business performance strategies. He is a 20 year veteran of the learning industry having designed and implemented numerous world-class e-learning and technology-based solutions for organizations including Citigroup, US Navy, McKesson, NCR Corporation, Tyco International, and Defense Acquisition University. Chris is widely recognized for his work in the areas of learning analytics, performance dashboards, learning maturity modeling, and learning management systems. His works bridge the gap between learning strategy and execution. In 2005, Chris was recruited and named as a founding advisor to the CLO Institute.

Prior to starting Zeroed-In, Chris was a co-founder and Chief Technology Officer for THINQ Learning Solutions, Inc. where he was the visionary and driver behind the TrainingServer suite of products. During his 15-year tenure at THINQ, Chris transferred his experiences and vision into a framework called The Learning Management Maturity Model (LM3). As a first of its kind, THINQ's LM3 combined organizational process maturity and learning technologies to help organizations define and execute on their learning and performance strategy.

Chris's efforts have won him respect as a speaker and author by leading trade associations and journals including The Conference Board, CLO Magazine, American Strategic Management Institute, CLO Institute, Talent Management, and Training Director's Forum.

Zeroed-In Technologies LLC

Zeroed-In Technologies provides software and services to help organizations visualize, measure, and execute effective learning and business strategies. Our award winning solution for chief learning officers, CLO Dashboard™, fills an important gap where learning management systems leave customers frustrated, needing to develop non-scalable workarounds for meaningful reporting, strategy alignment, project management, correlation, and basic learning measurement. CLO Dashboard collects measurement data from multiple learning and business systems and transforms it into actionable information. Our unique strategy model helps organizations define the right measures of success allowing you to demonstrate learning's contribution to real business impact for your stakeholders and executives.

Zeroed-In Technologies LLC
Baltimore, Maryland USA

Email: info@getzeroedin.com
Voice: (410) 242-6611
Fax: (443) 517-4000

Visit Zeroed-In Technologies on the web at:

www.getzeroedin.com