



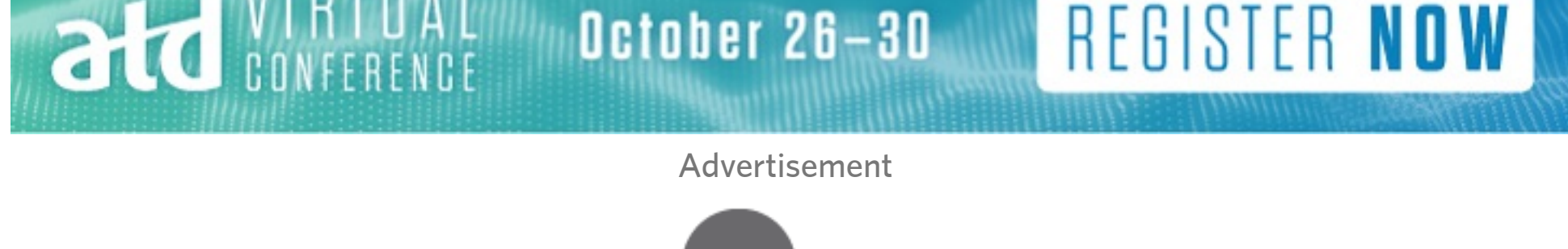
Designing and Implementing a Learning Strategy Plan

By Bruno Neal

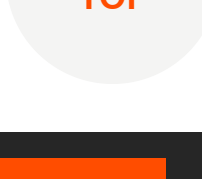
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Determine a good approach for achieving learning objectives by developing a plan for a clearly defined learning strategy.



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For a while now, instructional designers and learning professionals have been well aware of the importance of writing learning objectives that reflect the learners' needs and represent organizational goals. Several methods are used to capture specific learning objectives that can be measured after implementing a learning or performance improvement solution. However, are you sure that you are following an appropriate learning strategy? A well-defined learning strategy will determine the approach for achieving the learning objectives.

What is it?

I have created a model for a learning strategy plan, which combines Six Sigma, Malcolm Baldrige, and Andragogy (adult learning) principles. The model consists of a five-phase process that encompasses learning, and includes instructional design models, media, methods, technologies, and learning styles. Your learning strategy plan should align all those components to ensure that they help to achieve the organization's goals.

Guidelines

The five phases of the learning strategy plan are approach, deployment, learning, integration, and results.

Approach. Make sure you understand the organization and audience well. Identify the method to be used to implement the learning strategy. The selected learning and educational methods, principles, theories, and models should be repeatable and based on reliable data and information. This consistency will make your process reliable and systematic.

In this phase you will need to:

- choose what ISD model you want to use
- analyze the audience needs and organizational goals
- verify source availability
- interview subject matter experts
- determine whether you need to design a learning solution to address skills and knowledge, or a performance improvement solution to address attitude and behavior
- identify whether you should incorporate some parallel initiatives such as organizational change management, informal learning, coaching, or mentoring
- identify learning objectives and business objectives
- consolidate your learning strategy plan into one document.

Deployment. Start implementing the learning strategy plan established during the approach phase. The plan will need to refer to the extent to which your approach is applied in addressing the education and learning strategies selected for the project, and how to apply this approach consistently. Deployment is evaluated on the basis of the breadth and depth of implementation of the approach to relevant work units, teams, and departments throughout your organization.

In this phase you will need to:

- develop training material
- define strategic moments for the use of social media and informal learning initiatives
- coordinate the logistics of synchronous webinar or instructor-led training
- implement evaluation tools to measure the learning strategy
- survey your clientele and identify lesson-learned key points.

Learning. Your learning strategy plan should focus on two distinct kinds of learning: organizational and personal. Organizational learning is achieved through research and development, evaluation and improvement cycles, workforce and stakeholder ideas and input, best-practice sharing, and benchmarking.

To be effective, learning needs to be embedded in the way your organization operates. This means that learning is a regular part of daily work; is practiced at personal, work unit, and organizational levels; results in solving problems at their source ("root cause"); is focused on building and sharing knowledge throughout your organization; and is driven by opportunities to effect significant, meaningful change and to innovate.

In this phase, collect the client survey results sent at the end of the deployment phase. The lesson-learned key points will help you to identify gaps in your learning strategy process. To achieve the highest levels of organizational performance, determine solutions to the lessons learned throughout the learning initiative.

In this phase you will need to:

- refine your approach through cycles of evaluation and improvement by analyzing the lesson-learned results
- encourage breakthrough change to your approach through innovation and lesson-learned results
- share refinements and innovations with other relevant teams and processes in your department and organization.



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Integration. Focus on harmonizing plans, processes, information, resource decisions, actions, results, and analyses to support key organization-wide goals. Effective alignment requires a common understanding of purposes and goals. It also requires the use of complementary measures and information for planning, tracking, analysis, and improvement.

In this phase you will need to:

- make sure your approach (phase one) aligns with the organizational needs identified during the project analysis phase
- verify that your measures, information, and improvement systems are complementary across processes and departments
- validate that educational and learning strategy plans, processes, results, analyses, learning, and actions are harmonized across processes and teams to support organization-wide goals.

Results

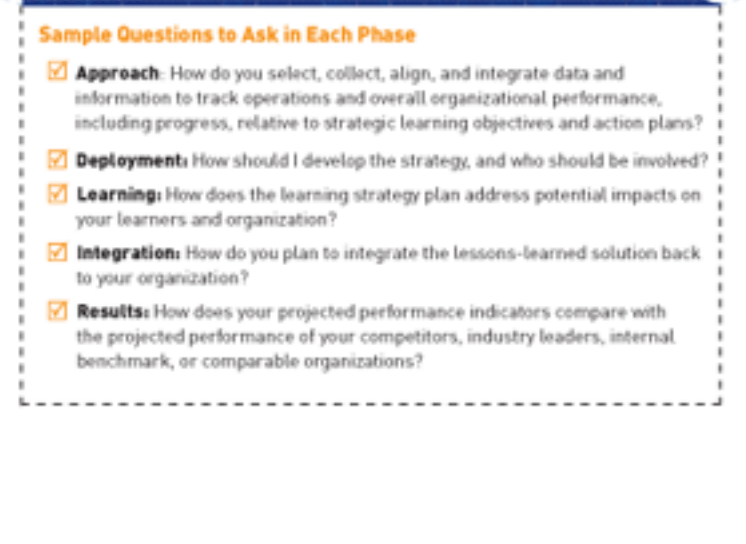
Identify indication of either improvement or achievement of expected outcome. Once the learning strategy plan is deployed, and lesson-learned key points are identified and addressed during the integration phase, it is time to measure and evaluate the indicators of performance improvements or the sustainability of good performance.

Compare the results with reliable industry benchmarks or industry leaders, such as the ASTD *State of the Industry Report*, and to results of initiatives implemented by competitors and organizations similar to yours.

It is important that your results:

- show the main characteristics of your market or industry
- show improvement of processes
- demonstrate the accomplishment of an action plan to address a performance requirement identified during the approach phase
- forecast valid indicators of future performance
- show alignment between organizational goals, learning objectives, and stakeholders' expected outcomes.

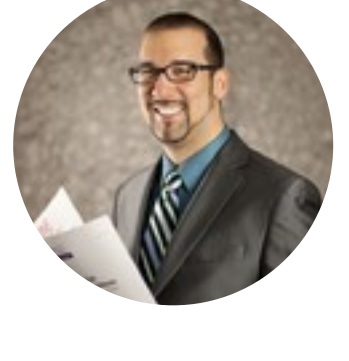
A workplace learning and performance professional should be responsible for valuing the people in his workforce by committing to their engagement, satisfaction, development, and well-being. Increasingly, this involves more flexible, high-performance solutions customized to varying workplace and learners' needs.



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ABOUT THE AUTHOR
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Bruno Neal is a scholar and a learning and development authority. He has written dozens of articles on learning and development, two *Infoline™* issues on Informal Learning and Quality in Learning and Development, and one *7D at Work™* on Learning and Development in Healthcare. He is a Certified Professional of Learning and Performance (CPLP), and currently works as an L&D leader for Indiana University Health. He has been appointed to the 2010, 2011, 2012, 2013, 2014, and 2015 Board of Examiners for the Malcolm Baldrige National Quality Award, a judge of the 2011, 2012, 2013, 2014, and 2015 Association for Talent Development (ATD) BEST Award, and Chair of the award committee since 2014.

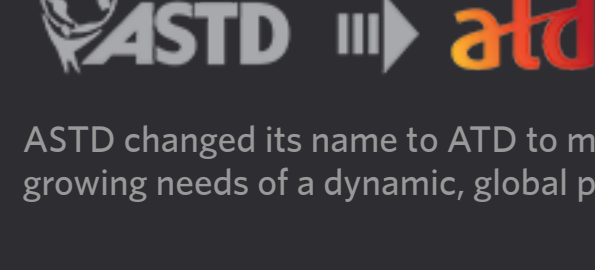
Neal was awarded with the highly esteemed American Society of Training & Development BEST Award in 2009, and part of the team awarded with the same achievement in 2011. He also was awarded with the Champion of Learning Award Certification for his contribution to learning and professional development in 2011. In 2015, Neal received the Global Training & Development Leadership Award at the World Training & Development Congress in Mumbai (India) for his contributions to the international learning and development community.

Neal also serves as contributor for ATD's *T+D Magazine*. In addition, he has spoken at ATD International Conference & Exposition, local chapters of ATD across the United States, Cancer Treatment of America, Training Magazine conference, the Training and Medical Users Software of the National Association of Electric Distributors (NAED), Medical Users Software Exchange (MUSE), and ATD's Learn from the BEST conferences.

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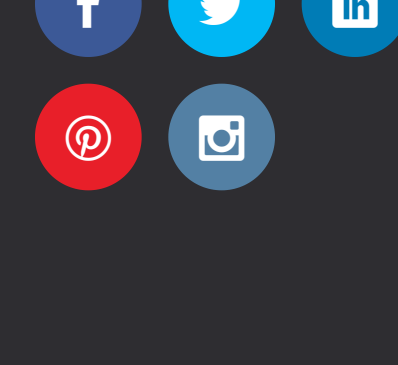


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