



## Learning Solutions, April 2010

### Does Your Training Support the Business Needs?

**Imagine this:** Your department manager, division VP, or training director asks you to develop training on effective communications. What do you do? Jump to action and create the course? Or ask questions to identify the business drivers, operational gaps, and performance gaps to ensure the course you create delivers results to the business?

I ask these questions because I frequently conduct course audits for my clients and see a common trend in the audits: The stated learning objectives do not clearly align with business needs. So, how can you go about developing training that supports business needs? In this e-letter you will read about a 4-step checklist to help ensure alignment. But first, a picture to help you see where the steps fit in:



Ideally, customer and shareholder desires and expectations will drive organizational goals, which in turn will inform department and employee goals and outcomes. Moving from the inner circle outward, the work performed by employees ideally support department goals, which support organizational goals and meet customer and shareholder desires and expectations. Thus, any interventions (such as training, a new system implementation, or an updated work process) should ultimately support the outer circle.



Irene Stern Frielich  
President

***What challenge have you recently faced aligning training with a business need?***

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Often, requests for development of training programs originate from somewhere in the inner circles. As instructional designers, curriculum developers, and organizational development practitioners, it is our responsibility to ensure alignment of training with business needs. Use this checklist to help ensure alignment.

### 1. Identify the source of the stated training need.

In order to find out more about the presented need, the first step is to talk to the people who think there is a need. Did your department manager hear about this from her colleagues in other departments? Did your training director just return from a senior manager summit with a directive? Asking about the source of the stated need is a critical step to being able to determine the gap between actual and desired business results so that you can develop the right training (or determine that training isn't the way to go).

Let's call the source your business partner(s).

### 2. Meet with the business partner(s) to determine the business driver/need.

Your next step is to meet with the business partner, which might be more than one person. In fact, it is helpful to hear different perspectives. Focus the conversation on the business impact to get at the real issue. One way to do this is to **ask "so what?" types of questions** such as "why is that important?" or "what is the impact of that?" until you uncover the business driver.

Here is an example:

Your Question	Your Business Partner's Response
Why do you feel a course on loan documentation is necessary?	There are too many errors being made on the applications.
So, what is the impact of that?	The loan processors need to make phone calls to the loan officers to obtain the correct and complete information.

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Your Question	Your Business Partner's Response
Why is that a problem?	It takes time; the loan officers and processors end up wasting about four hours a week in these follow-up calls.
How does that impact business?	It requires us to pay loan processors unnecessary overtime and takes the officers away from their sales work, resulting in possible lost sales. So, it's an issue of actual and costs and opportunity costs.

Keep in mind, you haven't confirmed a training need yet. So far, you have learned something needs to change so loan applications are completed fully and accurately. Continue the conversation to **determine the operational gaps**. Ask questions such as: What is the current reject rate due to incomplete applications and what is the target? What is the current turnover rate and target?

Here is another example in which your business partner has asked for a training workshop on "improving communications":

Your Question	Your Business Partner's Response
Why do you feel better communication is necessary?	My project team doesn't work well together. They never communicate what they need until it's too late.
So, what is the impact of that?	It impacts the rest of the team and we end up working overtime or running late on a project.
Why is that a problem?	It costs money and burns out staff members, who tend to leave the group. Turnover is high, also costing money to hire and retrain new staff. Morale suffers and projects slow down even further.
Ok. How does that impact business?	Our internal clients get frustrated with us and I've heard some clients leave us. Sometimes we also lose revenue when a project runs late.



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Is a workshop on communications the answer? If you thought, “perhaps” you are right. Again, you should continue the conversation to determine the operational gaps. Ask questions such as: What is your average project late-completion rate and what is the goal? What do you currently spend on overtime and what is the goal?

Identifying the operational gaps will not only help identify the appropriate solution, it will also aid you in measuring the impact of your training (or other) solution.

There is much that can be, and has been, written about the topics covered in steps 2 and 3. One great reference is *Performance Consulting: A Practical Guide for HR and Learning Professionals* by Dana Gaines Robinson and James C. Robinson.

### 3. Conduct a performance gap analysis with the business partner and additional stakeholders.

Once you’ve confirmed the business driver and identified the operational gaps, it is time to perform a performance gap analysis to identify the state of current and desired performance. Based on the results, you will design an intervention to close the gap. That intervention could be, for example, a training course or a job aid or a change to infrastructure.

Remember, training isn’t always the answer and even when it is, some work environment change is almost always needed. How to make that determination is another topic for another e-letter. But consider the following possibilities:

- In the loan application example, you might identify the need to update the loan application system to require field completion and provide prompts about field data; provide a job aid of an application with notations about pertinent fields; and/or prepare an e-learning course in which learners practice identifying incomplete or incorrect information.
- In the communications example, you might determine the project management process itself requires updating or formalizing; project managers need to set clearer expectations (and may require a workshop on how to do so); and/or team members need to learn what the process is.



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#### 4. Write the learning objectives that will help close the performance gap and support the business need.

Next, if you have determined that training is the way to go, use the results of the gap analysis to confirm the target audience and define the learning objectives. Learning objectives need to be, at a minimum, aligned with key business needs, action oriented, and observable and measurable in the classroom/course. Learning objectives are usually preceded with a phrase such as, “by the end of this course learners will be able to...”

For example, consider: “Identify all the missing information in a car loan application.” It is action oriented and observable (“identify”) and measurable (“all”). It aligns with our business need of reducing errors (missing information) in order to reduce costs. Another example is: “List three ways you will apply effective communication techniques to contribute to completing a project on time.” This is actionable by the learner and both observable and measurable by the instructor. In addition, it aligns with our business need of completing projects on time.

Take a look at the following learning objectives. Can you find and correct the problem? Base your response on information provided in this article, and assume that all objectives begin with the phrase, “by the end of this course learners will be able to...” (See the end of this article for answers.)

##### A. Understand requirements for completing a loan application.

What’s missing?

How might you re-write it?

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##### B. List three techniques to cross-sell loans with other banking products.

What’s missing?

How might you re-write it?

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**C. Key concepts of effective communication while working on a project.**

What's missing?

How might you re-write it?

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**D. Describe the 5 steps of the XYZ project management model.**

What's missing?

How might you re-write it?

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For more information on writing learning objectives see *Preparing Instructional Objectives: A Critical Tool in the Development of Effective Instruction* by Robert F. Mager.

***CHALLENGE YOURSELF!!***

Conduct your own mini-audit by reviewing a course currently delivered in your organization. Were all four steps performed before developing the course? Are the learning objectives aligned with the business need? What adjustments need to be made to bring the course into alignment in support of business goals?



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## ANSWERS

### A. Understand requirements for completing a loan application.

- ? *Business alignment* This may be properly aligned if the outcome of step 3 identifies that workers don't know the requirements.
- ✗ *Action oriented and observable* While "understand" is a verb, the instructor cannot observe the learner's "understanding." A better choice would be "list."
- ✗ *Measurable* How many requirements does a learner need to know? All of them? Five of them? Those that will result in most re-work time?

Acceptable learning objectives (assuming alignment with the business need) include:

- List all required fields in a loan application.
- Identify all missing fields in a submitted loan application.

### B. List three techniques to cross-sell loans with other banking products.

- ? *Business alignment* Was cross-selling one of the business needs identified in your interviews? If not, this learning objective may not be in alignment with the business need. If it is, consider if it fits in with the main purpose of the course. Also consider if "listing" techniques meets your business needs, or if those techniques should be demonstrated.
- ✓ *Action oriented and observable* Requiring the learner to "list" things is action oriented and observable. Consider if you want the learner to be able to list items or demonstrate effective use of the techniques.
- ✓ *Measurable* The instructor can determine if the learner meets the requirements by reviewing a written list provided by the learner, e.g., as part of an assessment.

This objective is well-written if it is, in fact, aligned with the business need.

A lot more can be written about these sample objectives.

What comments and suggestions do you have?

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**C. Key concepts of effective communication while working on a project.**

- ? *Business alignment* This may be properly aligned if the outcome of step 3 identifies that effective communication is the reason for the problems described.
- ✘ *Action oriented and observable* An action is missing, and so this statement is also not observable. Adding “understand” is not adequate since, as described earlier, the instructor cannot observe the learner’s “understanding.” A better choice would be “define.”
- ✘ *Measurable* How many key concepts are there, and how many of them is a learner required know (or define or describe)?

Acceptable learning objectives (assuming alignment with the business need) include:

- Define each of the five concepts of effective communication.
- Describe a specific positive action that supports each of the five communication concepts.
- Respond to a scenario positively demonstrating at least three of the five communication concepts.

**D. Describe the 5 steps of the XYZ project management model.**

- ? *Business alignment* Again, this may be properly aligned if the outcome of step 3 identifies that workers’ ability to use a project management model is a performance gap.
- ✓ *Action oriented and observable* Requiring the learner to “describe” things is action oriented and observable. Consider if you want the learner to be able to describe items or demonstrate effective use of the techniques.
- ✓ *Measurable* The instructor can determine if learners meet the requirements by asking them, for example, to explain the steps to each other or to the rest of the class.

While this objective is fine as is, alternatives may include:

- Identify three actions that support the XYZ project management model.
- Create an action plan to support one of the steps of the XYZ project management tool.



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