



Learning
Light

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Aligning Learning to Performance

Part of the Learning Light 'Active Learner' Series

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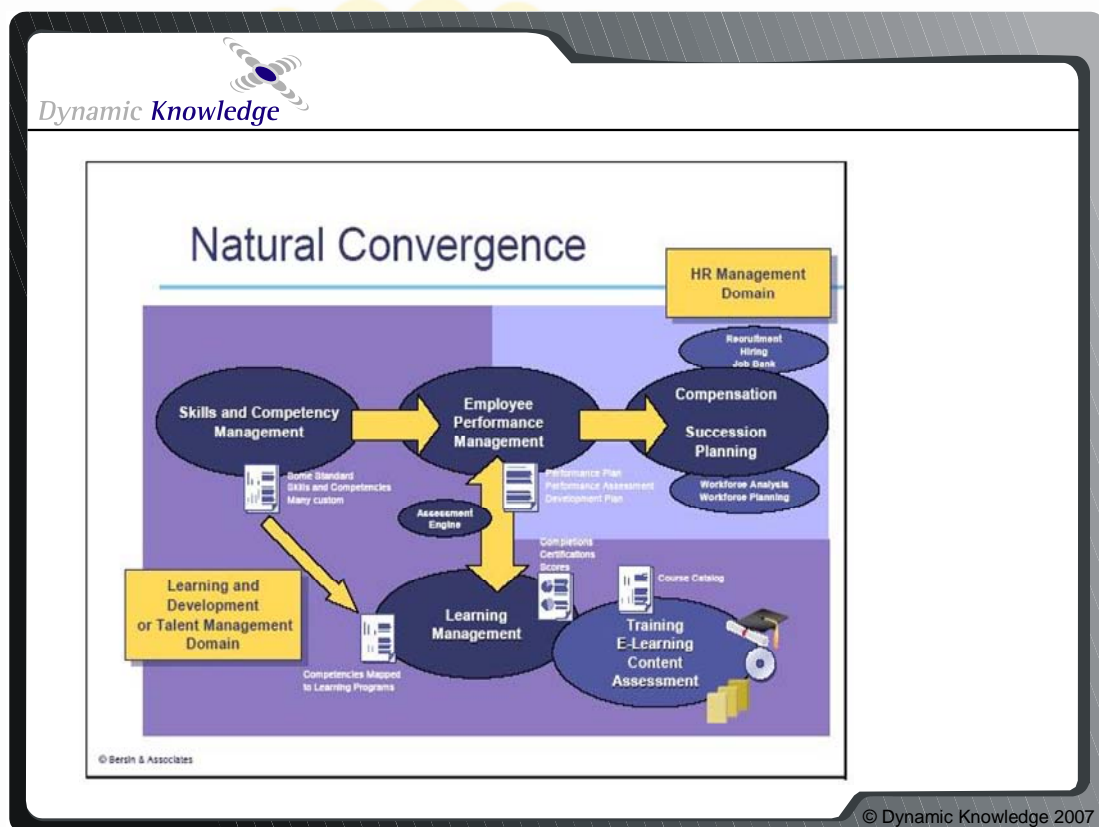
DKTRP



Debbie Carlton and Jim Lacey



The 2005 Bersin report 'Convergence between Learning & Performance Management' identified the natural convergence of learning and performance systems and triggered increased focus on the 'Learning & Development or Talent Management Domain' (as shown by the diagram below).



Organisations were increasingly asking themselves 'how can we implement an enterprise-wide performance management and goals management system, which drives operational business performance improvement? How can we use this information to drive learning and development, succession planning, and other talent management functions? How do we measure if we are doing this as effectively and efficiently as possible?'

This convergence appears to be gaining momentum particularly if one believes what the Human Capital or Talent Management technology companies tell us. However, Learning Light's recent research has identified



that although there is commonality around some of the organisational challenges of aligning learning to performance, there is a distinct lack of research concerning scientific-based management and instructional practice related to this topic.

For example, Bersin identified (Performance Management, 2006) that the top driver for organisational performance management was to reward and retain the best performers; yet only 15% of organisations use any type of cascading goals today. But the research did not identify the importance of leveraging core and cross functional capabilities and competences that are critical path to the organisation performance activity to identify the top performers who are proficient in these competences. It is more than just cascading goals but recognising and **aligning** relationships between organisation key performance indicators (KPIs) and the process activities and outputs that result in an outcome, and that critical path processes are often cross functional. If an organisation cannot identify who is proficient in these competencies it does not know who its top performers are. However, there are effective and sustainable models that expose critical path manpower alignments with organisational value stream performance factors.

In the Bersin report 'High-Impact Measurement', 2006 (see HP case) there was clear identification that there is a correlation between organisations maturity and organisational learning performance. A mature organisation was described as an organisation that is performance focused with a high level of transparency and focus on business optimisation. However, "why transparency is a key change enabler" was not discussed and yet there is evidence of the behavioural economic gains derived from increased transparency.

Another related example, is Bersin (Convergence between Learning & Performance Management, 2005) identified that 60% of **training managers** stated the alignment of learning with business strategy was their top priority. But did the research identify if these training managers really understand how to measure 'learning' performance (both the learning function's response to business needs and its performance relative to that response) or even why or how to implement performance driven learning effectively?

No, the prime research focus was that if the performance process is integrated with the learning processes the learning organisation has



immediate visibility into the demand level for different types of learning activities. If not integrated the learning function remains reactive to requirements as they appear. There was no discussion of how these learning activities should be derived and the importance of authenticity.

In addition although the research identified that both learning & performance management have extensive needs for assessment and reporting there was no discussion of an integrated approach that ensures that all assessments are derived from a common rubric derived from business goals. Reporting data should be derived in a consistent and transparent manner so that line managers can have an integrated view of performance attainment, learning achievements, and the status of planned activities.

Some excellent work by IBM¹ looked at learning as a provider of strategic value to organisations to accelerate growth, enable transformation and increase productivity. The research focused on the learning function's response to business needs and its performance relative to that response. The research highlighted senior managers' desire for learning to engage early to analyse and improve the design of jobs, processes and technology and then to show correlation between role competence and business impact. Learning governance was seen as a primary mechanism for aligning learning activity with strategic business needs. The research also identified that learning alignment indicators fall into three categories: integration of learning function with business goals, proactive and responsive learning operations and perception indicators to monitor executive, business unit leader, and employee and learner satisfaction. Both chief executive officers and senior learning managers see not only the integration but transparency of business and learning goals as critical – “the dashboard for global learning should start with the CEO priorities and then map all of the learning activities to those”.

Kaplan and Norton suggest the only true organisational training goals are to predict financial and operational performance. This seems sensible, however, enterprise workforce development rarely evaluates the learning/training domain against 'graduate' performance in the workplace. Reports like Bersin 'High Impact Measurement', 2006, identify that measurement continues to be a profound challenge for organisations and is a particular concern of senior managers. Some of the reasons cited are that existing models (Kirkpatrick, Phillips etc.) tend to limit an organisation's thinking which makes the implementation of measurement process difficult and that measurement of

¹ 'The C-Level and the Value of Learning', Tony O'Driscoll, Brenda Sugrue and Mary Kay Vona



training impact is difficult because we are trying to measure factors that improve human performance.

However, there is a lack of recognition within current research that measurement does not matter unless there is transparency from an organisation's critical path wealth creation activities to ensuring precision in describing behaviours and conditions for performance through explicit performance objective statements, to the alignment of "learning" to authentic contexts and finally measuring knowledge, skills, and abilities under the "point of performance". This becomes more challenging but rewarding as organisations move away from learning events to a learning continuum.

There is no doubt that Bersin and other recent reports have clearly identified that aligning learning to performance is critical there are clearly some factors, like critical path, relevance of cross functional skills, assessment rubrics, transparency, governance, measurement of authentic performance etc., that either need to be researched further or existing validated models need to be more widely exposed to organisations. Although validated models are relevant they may be only open to interpretation by the more mature organisation, and how does an organisation really know how mature they are before they embark on this alignment journey?

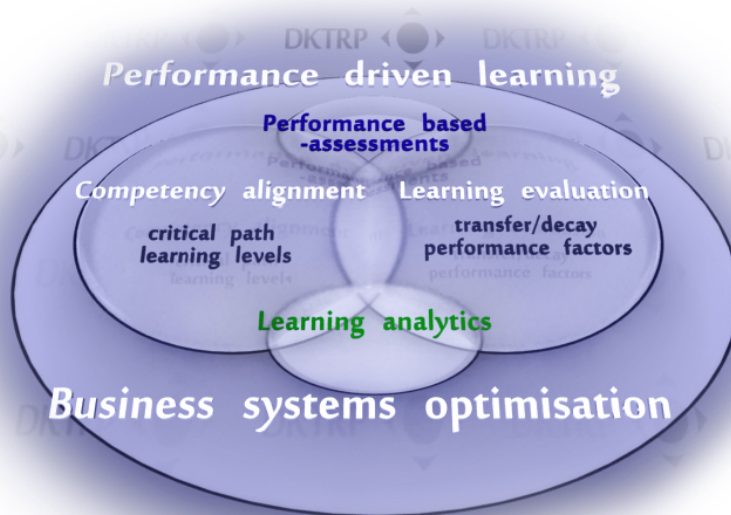
As a result of this research Learning Light decided to firstly identify organisations that have developed approaches or models that address these alignment factors and then to work with these organisations to develop best practice and research tools.

Turtle Rattle Performance/Dynamic Knowledge Alliance (TRP/DK) is one of the few organisations to have taken a more holistic and integrated approach (as shown in the diagram below) to aligning learning to performance that is underpinned by scientific-based management and instructional practice. TRP/DK believe that when learning is aligned to warranted value stream processes and procedures, learning becomes an integral part of quality assurance and systems business optimisation.

In this first of a series of articles related to this topic we have briefly identified what critically needs to be aligned so that we can introduce some work in progress concerning the development of a Learning Light Learning Performance Value Analysis (LPVA) maturity model.



Alliance core strengths



This LPVA research tool is intended to help organisations identify where they sit on the “aligning learning and performance evolutionary process” and then determine gaps or any need for improvement in order to identify solutions that align realistically to what is achievable in their organisations. This will be of particular relevance to organisations who are looking at ‘how learning can play a greater role in capability and asset management’ to organisations who are ‘trying to bring performance management, business intelligence, strategic HR and learning/training together as an integrated business system’.

Learning Performance Value Analysis reflects an organisation's ability to execute performance driven learning effectively and efficiently to meet current strategic business needs as well as creating capability for the future. Performance driven learning ensures that investment in learning activities is always focused on validated critical path performance elements. Critical path performance elements concern performance factors (that are often derived from business processes that are cross-functional) that are critical path for a particular job. This then enables designers to allocate effort to use cases from which to design a continuum of learning activities/event and assessments that ultimately enable the job holder to be assessed at the point of performance.



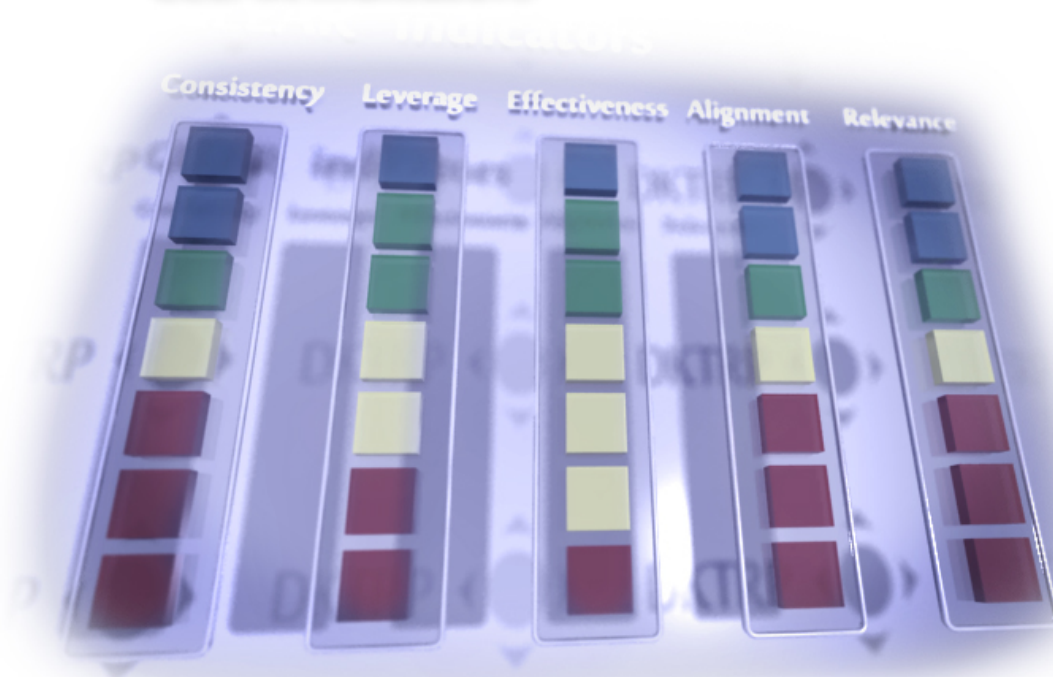
taking into account any prior learning needs. All learning or training programmes should solve critical and timely business problems.

The LL LPVA Maturity Research Tool will consist of a 'CLEAR' methodology and processes used as a supported operational diagnostic tool in assessing organisational learning performance value including its complete value stream and relationships to and impact on the interconnected dynamics of human capital performance.

The diagram on the next page provides an overview of the CLEAR (Consistency, Leverage, Effectiveness, Alignment and Relevance) model which we believe identifies the critical learning performance value indicators of which alignment is one and the most critical. In follow up articles we will look at these other factors, their interrelationships and how they are used to determine learning performance value.



CLEAR indicators



The five CLEAR indicators are considered within the context of a dynamic performance and learning environment as the process, people, methods, metrics and assets are very different for each knowledge, learning, business process and task performance level. For example, at the business process level an organisation cannot arbitrage resources at a moment's notice if they do not know if and where they have people with the rights skills and indicators that if an employee is moved or seconded that his/her performance will be predictive. Whereas at the knowledge process level time is a critical factor, as searching for, assimilating and applying knowledge may be too inefficient for the organisational environment and its performance needs.

Once the LPVA Maturity Model is developed it will enable an organisation to



carry out a supported diagnostic activity to determine its relative Learning Performance Value. The outcome of the diagnosis will identify if the organisation has a High, Medium or Low Learning Performance Value. A low learning performance value obviously then raises questions concerning value for money of learning investments. An organisation at this level then clearly needs to understand why and how learning can be more performance and value driven and what first steps it might take. Whereas a High Learning Performance Value will probably indicate that the organisation needs to concentrate on optimising the “learning curve” particularly for high performers in the organisation.

About the Authors

Debbie Carlton is a strategic learning and performance consultant and one of the UK’s leading specialists in performance driven learning. Debbie is the founder of Dynamic Knowledge and leads a small, expert team of learning and development professionals. She has an alliance partnership with US-based Turtle Rattle Learning and their joint expertise delivers a Rapid Application Development (RAD) approach to performance driven learning, greatly reducing timescales and costs whilst ensuring that any investment in learning and development has a predictable and measurable outcome aligned to critical business processes. Debbie is a chartered engineer, has an MBA in project management, and has been involved in the development of distance and e-learning since 1985 in Europe and Asia Pacific. She regularly contributes conceptual papers and research reports to the research services of leading Human Capital Management foundations and analysts groups.

Jim Lacey. Jim Lacey is Chief Executive Officer and Senior Solutions Architect of Turtle Rattle Learning, Turtle Rattle Performance, and the recent Native American start-up, Oshynee Enterprises. Jim has led numerous practical corporate workforce studies and authored more than two dozen white papers. He advises organizations on strategic approaches to workforce alignment to organizational performance. Applying Six Sigma principles to learning related products and services, Jim developed a process, math model and logic algorithms for identifying, isolating, and designing critical path learning requirements from organizational performance factors. Developed Learning Materials Quality Function Deployment Methodology. This process has been proven in the design more than 150 technical courses and post-graduate evaluation of dozens more. Jim’s education includes Bachelor of Science Electronic Technology, Master of Science Business Administration, Master of Science Adult Education, and is a doctoral candidate in Education Leadership.