How to create an L&D Strategy from scratch

Lesson 2 out of 5

Understanding Business Strategy, Needs and Constraints

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LESSON 2:
Understanding Business Strategy, Needs and Constraints

Post Lesson Activity B: Critical Gap and Prioritisation Analysis

HOW TO USE THIS GUIDE

This is a facilitation guide. It is meant to help you facilitate a prioritisation exercise with your Power Team (check out lesson 1 if the term Power Team is unfamiliar to you).

The goal of the prioritisation exercise would be to align your key stakeholders on the learning priorities for the organisation. The exercise will also create space for your key stakeholders to have important discussions around the organisation's learning needs.

WHY DO IT?

As you can imagine, stakeholders across the business areas will have different ideas on what the key learning priorities should be. Therefore, a great way to align the different opinions and get stakeholder buy-in is to facilitate a discussion amongst all of them.

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WHAT YOU'LL NEED

- The consolidation of key themes from the needs analysis interviews done in Post Lesson Activity A
- Your results from the Learning Audit done in Lesson 1
- A place to work and document results such as a whiteboard, miro workspace or confluence document
- A meeting blocked for approximately 3 hours with your Power Team
- The "Power Team" members invited should include the stakeholders that:
    - Volunteered to give design input
    - Will give endorsement and resources
    - Needs to be kept informed, aligned and happy

AGENDA

- Create a question and assumption parking lot
- Pre-meeting preparations: Identifying critical learning gaps
- Align on common goals (current and future) + Introduce the agenda
- Voting on priorities
- Preliminary timeline mapping
- Sanity check
- Discussing champions and enablers

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STEP 1: PRE-MEETING PREPARATIONS: IDENTIFYING CRITICAL GAPS

Instructions:
- Take the data that you have consolidated from the needs analysis interviews conducted in Post Lesson Activity A and transfer them to your shared working space following the template format "Current Needs" and "Future Needs" below
- Looking at the results of your Learning Audit, highlight all the KSAs and corresponding employee groups that are already served by existing learning initiatives that your team has opted to keep/adapt
  Note: The unhighlighted KSAs are your critical learning gaps
- Prepare a "questions and assumptions" space on the board to capture questions during the meeting
- Prepare a summary of current and future organisational goals and respective key employee groups. You can fill it in based on the key themes from the needs analysis interviews

Current Needs				
KSA	**Employee Group/ Role**	**Reason for importance**	**% already proficient**	**Prioritisation**
E.g. Asynchronous communication	E.g. Customer success employees	E.g. Team moving remote in different time zones	E.g. 20%	(Leave this column blank)

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STEP 1: PRE-MEETING PREPARATIONS: IDENTIFYING CRITICAL GAPS

Future Needs				
KSA	**Employee Group/ Role**	**Reason for importance**	**% already proficient**	**Prioritisation**
E.g. Managing resources and budgets	E.g. Technical and people leaders	E.g. We are planning a finance transformation in 2 years	E.g. 40%	(Leave this column blank)

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STEP 1: PRE-MEETING PREPARATIONS: IDENTIFYING CRITICAL GAPS

QUESTIONS	ASSUMPTIONS
Current Organisational Goals (1-2 years)	**Future Organisational Goals (3-5 years)**
Key employee groups/roles	**Key employee groups/roles**

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STEP 2: ALIGN ON COMMON GOALS (CURRENT AND FUTURE) + INTRODUCE THE AGENDA

Why do this?

Before jumping into a discussion about priorities amongst stakeholders with differing agendas, it would be beneficial to align them all on a common goal - the "north star". This way, when stakeholders are having a disagreement, you can help them reflect on which choice will better help the organisation achieve its goals.

Instructions:

• Introduce the goals of the prioritisation session and what steps will be taken to determine the learning priorities
• Present the current and future goals and respective key employee groups/roles that you had pre-filled to the group
• Check-in with the group on whether everyone agrees, and if amendments need to be made.
• If the group generally agrees about the proposed amendments, make the requested amendments

Current Organisational Goals (1-2 years)	Future Organisational Goals (3-5 years)
Key employee groups/roles	**Key employee groups/roles**

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STEP 3: VOTING ON PRIORITIES

Why do this?
With many stakeholders holding differing agendas, it can be easy to get stuck in endless discussions. The voting process designed below allows for the "majority will" to be expressed, but also builds in flexibility for sanity checking the results later.

Instructions:
- Ask the leaders to keep the current goals in mind and individually fill in what the prioritisation for each KSA+employee group should be. This step should be done in silence.

   Leaders should leave a number on each KSA on the table of "Current Needs" to indicate prioritisation
   - 0 = not important for achieving current goals
   - 1 = Somewhat important, upskilling this will bring benefits
   - 2 = Important, if we upskill this, it would really help us meet our goals
   - 3 = Critical, this needs to be developed yesterday

- After "Current Needs" have been completed, repeat for "Future Needs". Ask the leaders to keep the future goals in mind and fill in what they think the prioritisation should be for each KSA on the table of "Future Needs"
- Call for a 15 minute break. During this time, calculate the total "Prioritisation" score for each KSA (see example below for more details)
- Once the totals have been calculated, arrange the KSAs from highest to lowest in priority on post-its or cards so that your Power Team can easily drag and drop them

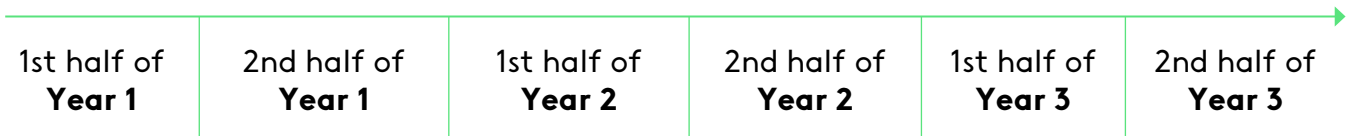| Current Needs				
KSA	**Employee Group/ Role**	**Reason for importance**	**% already proficient**	**Prioritisation**
E.g. Asynchronous communication	E.g. Customer success employees	E.g. Team moving remote in different time zones	E.g. 20%	E.g. 1, 2, 2, 2, 2, 3 Total = 12

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STEP 4: PRELIMINARY TIMELINE MAPPING

Why do this?
In order to create a roadmap for your L&D strategy, you'll need to know when each priority needs to be developed by. This way, you can calculate backwards to find out which learning priorities you should start with.

Instructions:
- When your stakeholders are back from the break, share the KSAs from highest to lowest with them
- If there are KSAs that have a very low score (mostly 0s and 1s), invite the stakeholders to consider if they can be removed. Help them to keep in mind that the L&D strategy will be a living document where changes will be made periodically
- Invite them to discuss among themselves. How would they would prioritise the KSAs on the following timeline?
  Note: they should arrange it not based on when the development program should start, but when people need to already be upskilled in the respective KSA

1st half of **Year 1**	2nd half of **Year 1**	1st half of **Year 2**	2nd half of **Year 2**	1st half of **Year 3**	2nd half of **Year 3**

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STEP 5: SANITY CHECK

Instructions:
- Invite your stakeholders to reflect on the following questions
    - Taking the perspective of your business area/target group, with this development plan, will you be able to achieve the 1-2 year goals of your business area?
        - If not, what needs to change on the timeline?
    - Taking the perspective of the organisation's 1-2 year goals, will this development plan bolster the chances of the organisation's success?
        - If not, what needs to change on the timeline?
    - What in your opinion can really be pushed back to year 2 or later? (Remember that focus is better than trying to tackle too many things at once)

Note: You will find that this step will create a lot of discussion among your stakeholders. Remember to give space for them to speak, but also facilitate the discussion by helping your stakeholders see common ground.

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STEP 6: DISCUSSING CHAMPIONS

Why do this?

At this stage, you should have a rough draft of your learning priorities arranged according to the timeline. However, it's easy to lose momentum once the discussion is over and all stakeholders return to their day to day work.

In order to ensure that you have advocates within senior leadership to keep the momentum going and ensure that resources will be available, you'll need to find champions.

Instructions:

• For each of your learning priorities on the roadmap, have your stakeholders choose which priorities they would like to champion
  • Championship means being available for consultation, advocacy during implementation and providing/negotiating the resources needed to make the priority a success
  • For learning priorities that are already covered by existing learning initiatives in the organisation, it would make sense to check first if the existing sponsor wants to continue championing the initiative
  • Note, L&D can also volunteer to champion certain priorities!

KSA	Employee Group/Role	Champion
E.g. Asynchronous communication	E.g. Customer success employees	E.g. Tom Hatton

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The
End!

Congratulations on completing your Critical Gap and Prioritisation Analysis session with your Power Team!

Look out for lesson 3: "Creating L&D Goals and Metrics". We'll go over how to create L&D goals and set metrics to measure results for the L&D priorities that you have just identified.

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