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TIPS, TOOLS & INTELLIGENCE FOR DEVELOPING TALENT

TURNING TRAINERS INTO STRATEGIC BUSINESS PARTNERS

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TURNING TRAINERS INTO STRATEGIC BUSINESS PARTNERS

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Talent development solutions, while at the heart of an organization's success, can be expensive endeavors. Their value can be questionable if they're not clearly linked to organizational priorities.

As learning and talent development (LTD) professionals, we need to make sound decisions about which strategies will have the biggest benefit to our organization. To do so, we must have information that guides us toward solutions that measurably help the organization achieve strategic objectives, providing us with hard evidence of our contribution to organizational success. Documenting these successes is critical for our credibility and sustainability as true strategic partners.

So how do we get that information?

Systems for aligning learning and performance (SCALE) is a set of processes and tools for measurably aligning LTD solutions to strategic objectives. It addresses questions we, and our stakeholders, may have about the tangible value of our talent development efforts. SCALE is based on extensive research and practical application in the areas of strategy, systems theory, needs assessment, transfer of training, performance monitoring and evaluation, organizational culture, and change management. SCALE outlines both the what and the how for choosing and effectively integrating LTD solutions into the work environment, while providing a framework for measurably demonstrating how the solutions helped achieve organizational objectives.

This issue of *TD at Work* will describe:

- how LTD professionals can change their roles in their organization
- essential skills for the new generation of LTD professionals
- the SCALE process, and how it can help you match training initiatives with business objectives
- how to uncover stakeholder perspectives, optimize strategic alignment, and check in on your training effectiveness.

RETHINKING OUR ROLE AS LTD PROFESSIONALS

Consider your last talent development initiative and reflect on whether you had clear answers to the following questions before the solution was selected:

- What performance results do we expect from employees after implementing the solution?
- How will we measure the impact of our solution on the organization's performance?
- What are the organizational barriers that may interfere with the impact of our talent development solution in the workplace?
- How do (and will) our managers support performance in the organization?
- How do we ensure that desired workplace performance is maintained?

The LTD team has an important responsibility in uncovering the answers to these questions, as they help the LTD team and other organizational members clarify strategic priorities, determine the use of resources, and offer guidance on how products and services may be offered to external clients. All of these decisions are focused on creating a sustainable strategic advantage for the organization, rather than on fulfilling training requests.

Organizations spent approximately $156.2 billion on employee learning in 2011, according to ATD's *2012 State of the Industry* report. What would your stakeholders consider to be a valuable use of spending on your LTD initiatives? What returns and benefits has your organization received for its investment in LTD solutions? Organizations that use performance data to inform their actions have a much better chance at sustainable success and can make more effective decisions proactively.

The Goals and Purpose of LTD

People make the difference in organizations; they are what distinguishes you from your competitors. Think about your personal experiences with companies. Would you pay a little more for a product if you knew you would

receive exceptional service? Would you purchase products from an organization whose quality was inconsistent or unreliable? We use these and other criteria to make decisions about which businesses we patronize.

As LTD professionals, our job is to develop our organization's workforce capabilities so that the employees are indeed the competitive advantage. When we focus our efforts on leveraging and developing this advantage, our work becomes aligned with business needs and generates real value.

Our Expanding Sandbox: Organizations as Systems

While performance improvement efforts like training are often viewed as expenses to the business, we can change these perceptions, our results, and our impact with a new mindset and new ways of approaching and carrying out our work. First, we must expand our thinking of organizations as systems and the role we play within these systems.

Have you heard the saying, "If you put a good worker in a bad system, the system always wins"? It describes the power of an organizational system, and how critical it is for us to think about how our work influences the performance within this system. It also guides us in our thinking about the performance of others in our organizations.

> AS LTD PROFESSIONALS, OUR JOB IS TO DEVELOP OUR ORGANIZATION'S WORKFORCE CAPABILITIES SO THAT THE EMPLOYEES ARE INDEED THE COMPETITIVE ADVANTAGE.

Our performance is influenced by our interactions with our work environments. For successful implementation of our performance improvement initiatives, we must have an understanding of an organization's anatomy and how our work fits within this anatomy.

Consider the analogy of human anatomy. When you feel pain in a part of your body, you visit the doctor to treat it. The doctor examines where it hurts and what triggers the pain, and considers how various treatment options would affect not only the area of pain, but also other parts of your body.

Just as the doctor considers your whole body, performance improvement professionals consider all parts of organizational systems when a problem has to be solved. We do this by reverse engineering performance in organizations. We start with the goal in mind, uncover the gaps and important factors for reaching the goal, and engineer human performance that's aligned with organizational performance.

ESSENTIAL SKILLS FOR THE NEW LTD GENERATION

It is important to be aware of the cognitive habits that drive our technical tasks and behaviors as we seek to improve human and organizational performance. These cognitive skills frame our worldview and, in turn, how we approach our technical work. This provides us with a strong, flexible, and scalable base for understanding performance problems and selecting the best solutions.

If the LTD function is going to evolve to provide real value to an organization, it must take a system view of the organization to understand the interactions across various issues, events, and consequences. It must also apply strategic thinking to determine where the organization wants to go, where it currently is in relation to that destination, and how to best get there. System thinking is present at every phase of a strategic process because it involves clarifying relationships and alignment of a series of elements and steps.

Critical thinking is foundational for both system and strategic thinking, and is in fact a basis for most, if not all, leadership skills. Those who don't master basic critical thinking skills are not likely to go far within their organization. Likewise, collaboration skills are key to getting things done. Organizations comprise groups of people. People must work together to make things happen and achieve results. Therefore, effectively working in groups, and partnering with other groups, is critical to organizational (and LTD) success.

These are all complementary processes that the new generation of LTD professionals will have to master if we are to build credibility, become

strategic partners to management, and add real value to our organizations. Below, we provide specific tasks and steps associated with each of these core skills. These will be integrated into the SCALE alignment process described later in this *TD at Work*.

System Thinking

System thinking is critical for today's performance improvement practitioner. This approach to problem solving and decision making identifies the impact of a problem (and potential solutions) on the various segments of an organization, such as personnel, departments, customers, and suppliers. It is a way of thinking about how people, processes, and structures work together. Rather than perceiving performance issues as isolated, we see the relationships and interactions among the various parts of the organization. This view is holistic and essential to understanding the root causes of performance problems, as well as the potential success of any solution.

Strategic Thinking

Strategic thinking is a long-term perspective to problem solving and decision making. Performance improvement practitioners consider three timeframes—long term, now, and in between—with a focus on what has to be accomplished to achieve desired results. A strategic thinking approach to performance improvement offers opportunities to generate value, and supports the strategic priorities of the organization. As LTD professionals, we purposefully facilitate this strategic value by creating the links, or fit, between the work we do and the value it ultimately brings to our internal and external customers.

Some of the ways we do this include:

- Objective analysis: investigating what, when, why, where, and how.
- Planning ahead: anticipating multiple scenarios and appropriate courses of action.
- Thinking of how people, processes, and structures fit together in the organization.
- Focusing on the organization's competitive advantage. What is the organization's differentiator? How is that differentiator leveraged? Strategic thinkers leverage these differentiators for today and for the long-term sustainability of the organization.
- Identifying gaps between where the organization is today and where it wants to be in the future and devising appropriately aligned improvements to help the organization realize desired results.

Critical Thinking

Those in performance improvement roles use critical thinking to analyze, synthesize, and evaluate information to support the performance improvement decisions they make. These critical thinking activities are found throughout the SCALE process. Some examples are:

- recognizing that a problem exists
- developing an orderly approach so that tasks are prioritized and problems are recognized based on severity and urgency
- being aware of your own performance or thinking process
- asking the right questions
- synthesizing information from a variety of sources
- determining credibility and using this information to formulate and communicate decisions
- remaining open to a variety of solutions
- generating a reasonable method for selecting among several solutions
- explaining the rationale for decisions to different audiences
- presenting a coherent and persuasive argument on a controversial issue.

Collaboration

Working collaboratively means we have to ensure all stakeholders have a voice and the various people and teams involved are all communicating

effectively. Such relationship building creates a joint effort between the stakeholders and LTD professionals: Both groups are working together to achieve common organizational goals.

Some examples of collaboration in performance improvement work include:

- effective listening to better understand what's important to your stakeholders, the context of the performance problem, and the critical success criteria and measureable indicators for performance improvements
- promoting teamwork that recognizes and rewards achievement of group and organizational goals, rather than individual performance in the spirit of competition
- establishing partnerships with other groups in the organization and reducing work done in silos
- supporting and committing to group decisions to foster teamwork and shared accountability for performance improvement efforts.

SCALE: ALIGNING LTD SOLUTIONS TO STRATEGIC OBJECTIVES

In this section, we present an approach that integrates these four essential skills into a structured, yet flexible, process for ensuring that your talent development solutions are clearly aligned with strategic objectives and generate measurable evidence of your contributions to the organization's success.

The SCALE process consists of three phases, with three steps in each phase.

Phase one helps you understand the performance needs from various stakeholder perspectives. Stakeholders in this instance include the person who made the original request for assistance with a performance problem, and those who will affect or be affected by a selected solution. By considering these perspectives, you can choose the appropriate level of organizational alignment for the performance solution.

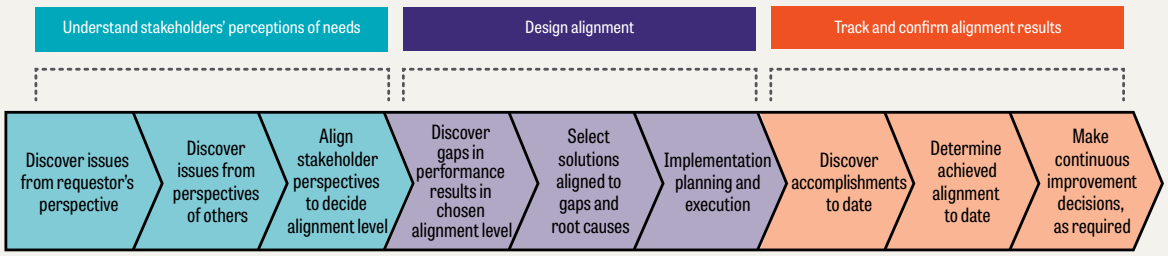
Phase two helps you discover the gaps in performance results for the selected level of alignment, select the solution that is appropriately aligned to gaps in results and their root causes, and work with stakeholders to create an implementation plan.

Phase three helps you track and confirm the results of the selected solution. With the solution in place, you will discover the accomplishments to date, determine the alignment to date, and make decisions about how to continuously improve performance or sustain desired results.

In addition to these technical aspects of SCALE, the essential skills that drive your ability to perform each of these steps successfully are identified with examples of how each is applied throughout the process.

Figure 1 is an overview of the phases and steps within the SCALE process.

FIGURE 1. THE SCALE PROCESS



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Phase One: Understand Stakeholders' Needs

The first phase of SCALE is your opportunity to uncover your stakeholders' needs. In this phase, you will find out what they think of the organization's current performance, their expectations for future performance, and how the solution can align with these needs. You'll then work toward gaining consensus for how best to approach the performance problem presented to you. You will also be able to identify barriers that may hinder performance and factors that may drive expected performance.

Table 1 provides an overview of the technical aspects of phase one.

The Requestor's Perspective

Imagine this scenario: A stakeholder has contacted you to request training. The requestor has likely determined training to be the solution to address a performance problem. To ensure this is actually the right way to address the issue, your next move is to ask some questions and find out more. Setting up a discovery meeting will allow you to learn about what prompted this request for help.

A MEETING THAT DELVES INTO QUESTIONS ABOUT PERFORMANCE NEEDS MAY BE FOREIGN TO STAKEHOLDERS. THIS IS YOUR OPPORTUNITY TO BEGIN CHANGING THE PARADIGM ABOUT WHAT PRODUCTS AND SERVICES YOUR TEAM CAN OFFER TO SUPPORT PERFORMANCE IN THE ORGANIZATION.

A discovery meeting is your opportunity to gain an understanding of the performance issue, the context of the performance issue, and the performance expectations of your stakeholders. This meeting should include one or more people from the LTD team and the person who requested service from you, likely the project sponsor. You can also use this as a chance to explain the SCALE process so the requestor knows how you will be working together.

In the initial meeting, the requestor will describe what performance looks like today and what she expects it to look like after a solution has been implemented. During this phase, we are interested in understanding more

TABLE 1. TECHNICAL TASKS FOR PHASE ONE

Step	Technical Tasks
The Requestor's Perspective	Conduct a discovery meeting with the requestor to understand the requestor's perception of the performance problem. Establish a partnership with the requestor. Gain commitment by describing the process to the requestor so she knows what to expect and how you will be working together.
The Perspectives of Others	Verify the project request with others to understand other people's perceptions of the performance problem. Establish a partnership with others and gain commitment to solving a common performance problem. Calibrate various perspectives.
Alignment Level	Select alignment level. Establish project roles and responsibilities, as well as expectation of stakeholders. Gain commitment by describing the suitability of the approach, its implementation, and its intended impact.

about the performance needs (in addition to wanted solutions) and making connections to organizational priorities. Remember, to better understand the needs and their root causes, we must look at the organization as a system.

Stakeholders may be accustomed to reaching out to the LTD team to request training as their go-to solution, so a meeting that delves into questions about performance needs may be foreign to them. This is your opportunity to begin changing the paradigm about what products and services your team can offer to support performance in the organization. While the way you conduct this meeting may be a little different from what stakeholders are accustomed to, don't let this stop you from breaking with tradition. You are establishing a partnership with the requestor. In time, you and your stakeholders will have a closer consultative relationship focused on strategic decision making that delivers performance results, rather than a strictly transactional relationship focused solely on the delivery of a learning service or product.

The Collaborative Discovery Meeting Tool job aid provides guidance for gathering information that will help you and your stakeholders better understand the performance problem. You can modify the questions in the job aid as appropriate, but make sure you walk away with a good grasp of the situation.

Once you have the answers from your discovery meeting, the next step is to calibrate that understanding. Coordinate with all relevant stakeholders to describe the purpose and expectations of calibrating the performance needs and expectations to participants. While this step may be performed, at least partially, through email correspondence, face-to-face meetings are recommended for organizations that typically request training as the solution to any performance problem.

Perspectives of Others

Next, you'll gather and bring together input from others in the organization who will affect or be affected by the solution. This will likely include the original requestor, supervisors, and employees.

The requestor provided you with some information in your collaborative discovery meeting. You now have to verify that information and understanding with others in the organization. This ensures that all perspectives are accounted for and addressed going forward. It's a good idea to make sure that all stakeholders are on the same page about what the problem is and how to address it. Otherwise, your solutions are bound to be met with resistance by some, and success could be compromised. You must gain commitment from all stakeholders.

Your job in the calibration session is to validate the responses you received in your collaborative discovery meeting. In other words, you will ask the same, or similar, questions that you did in the discovery meeting, but you'll be asking different people to see if everyone's in agreement. These sample calibration questions will help you interpret the information collected in the collaborative discovery meeting and determine if it applies to others in the organization.

- Is there consensus among the various stakeholders about the problem to be addressed? If not, why not?
- Is there consensus about the magnitude of the problem?
- Is there consensus about who will affect or be affected by the chosen solution?
- Does everyone share an understanding of the business goal being addressed?
- How consistent are performance expectations?
- How clear are the performance expectations?
- Is there agreement that a skill gap exists?
- If there's not a skill gap, is there agreement to explore noninstructional solutions?

It is likely that not everyone will agree with every response provided by your original requestor, but your job is to steer the group toward a group decision. The goal is to walk away from this meeting with everyone's commitment to resolving the performance problem. Your next step is to decide which alignment level is best for the agreed-upon problem.

Decide Upon Alignment Level

With a calibrated understanding of the performance problem, you can now make a decision about how to proceed. There are four alignment options from which to choose. You will make a selection from the four choices based on which is best suited to the problem using the following criteria: purpose, costs, benefits, risks, and impact potential on organizational success.

The four alignment levels table provides criteria you can use to decide how to align your work from this point forward. You can make a selection using the information you gathered from your stakeholders to determine the best way to approach the performance problem. It will be important to engage your stakeholders to reach agreement on the selected alignment focus—describe why the approach is the most suitable to the problem, how it may be carried out, and the roles and expectations of your stakeholders going forward.

The alignment choice made here will direct your workflow for the remaining steps, so this choice is an important one and, as such, will involve both you and your stakeholders.

Phase Two: Design Alignment

Throughout phase two, you will be optimizing strategic alignment processes by understanding the strengths and weaknesses of the value currently being (or not being) provided to your stakeholders. Alignment is a dynamic process that reflects ongoing changes in the environment

TABLE 2. THE FOUR ALIGNMENT LEVELS

Alignment Level	Purpose	When to Use It	Benefits	Costs and Risks	Impact Potential of This Level
External Value to Clients	To ensure the solution helps the organization meet the needs of external clients, society, or the community.	Organization wants to: Connect work to economic and personal security of external clients. Ensure long-term survival and profitability. Manage a significant threat, change, or opportunity.	Solution positively affects society. Greatest opportunity for organization's sustainability.	May be costly in terms of time and money up front. Realized dividends are long term.	Highest level of strategic impact. Can add value to customers and society at large, and in turn positively affect organizational sustainability.
Organizational Results	To align solutions and the organization's bottom line.	Organization wants to connect work to market share, revenue, sales, profits, and customer satisfaction.	Helps ensure organizational efforts and objectives are linked. May improve effectiveness of the organization.	May be costly in terms of time and money up front. Realized dividends are long term to midterm.	Potential for high level of impact on bottom line. Can improve organizational effectiveness.
Employee Results	To align solutions with specific accomplishments of a person or group.	Collaborators describe specific performance deliverables of a person or group. There is a change that will affect job outputs or requirements.	Helps align the right performance solution to tangible work outputs or products.	Assumes alignment to strategic objectives, which may not be substantiated.	Can improve operational effectiveness.
Work Processes	To align solutions with how work is done.	Collaborators describe a desire to improve how something is done or introduce a new way.	Helps ensure the organization does things right.	Assumes positive impact on outputs, which may or may not occur.	Can improve efficiency.

and aims for a fit between LTD initiatives and the organization's strategic priorities.

Your phase two efforts are aimed at executing your selected alignment focus. The tasks you complete are similar for each of the four alignment levels, but the information you gather and how you handle it will differ.

Table 3 provides an overview of the technical aspects of phase two.

Discover Performance Gaps

The start of phase two begins with discovering some more information, this time concerning the alignment focus you chose. You'll determine what the business and stakeholders want to achieve by examining goals, critical business priorities, and the organization's strengths and weaknesses, while remaining neutral about the requirements to get there at this point. You'll also work with your stakeholders to determine what successful achievement of those goals or worthy performance looks like. How will we know when we've successfully reached the goal? What are the markers along the way we should pay attention to so we can track our progress toward the goal? Knowing this information, you can then determine the gaps between what the desired performance should be and what it is today.

Document your findings by depicting the gap between the current performance and the desired performance. Here are a couple of examples:

Aligning to external value to clients. Let's say you have a desired result of zero accidents and zero cases of customer grievances. Currently, you have 10 accidents per year, and eight customer grievances. The gap is 10 accidents, and eight customer grievances.

Aligning to organizational results. Your goal may be to have a minimum of 40 percent market share, and a minimum of 35 percent profit margin. Currently, the organization has 30 percent market share, and a 23 percent net profit margin. The gap is 10 percent market share, and 12 percent profit margin.

Aligning to employee results. You may set your sights on sales and service professionals acquiring at least 20 new accounts per quarter, and all staff meeting or exceeding individual sales goals. Right now, you're acquiring 10 new accounts per quarter, with 90 percent of your staff meeting or exceeding goals. The gap is 10 new accounts per quarter, and 10 percent for goals met.

Aligning to work processes. You may seek to have your training programs incorporate current compliance information, with the programs accessible to all employees. Currently, 95 percent of your training incorporates current compliance information, and 98 percent of employees have access—leaving a gap of 5 percent of training content that's not in compliance, and 2 percent of employees without access.

TABLE 3. TECHNICAL TASKS FOR PHASE TWO

Step	Technical Tasks
Discover Performance Gaps	Assess performance context by examining goals, business priorities, and organization strengths and weaknesses. Identify performance success criteria. Compare current performance to desired performance.
Select Solutions Aligned to Gaps	Prioritize gaps in results. Document the priorities of the gaps and estimate the cost of closing gaps versus the cost of not closing them. Determine which ones to close and which to address later, if at all. Determine solution selection criteria. Collaboratively select solutions to address gaps in results.
Implementation Planning and Execution	Collaboratively devise an implementation plan, including solution design plan, delivery, and testing. Create a communication plan: Who will be involved and how?

Select Solutions Aligned to Gaps
Using your performance gap documentation, you will now engage your stakeholders in a discussion about which gaps to close and which to address later, if at all. Work with your stakeholders to determine the criteria you'll use to decide how to handle the gaps; see the Sample Solution Selection Criteria Checklist job aid for some ideas. Only after this step can an aligned solution be determined. By doing this, you will help to select the most appropriate, and aligned, solution for the performance problem. Not only will your stakeholders be engaged in decision making and the implementation of solutions, but they will also share accountability for the results.

Implementation Planning and Execution
Implementation planning and execution determines the collaborative plan to ensure successful use of the selected solution. With consensus of the solution selection criteria in hand, you can now agree on solution recommendations with your stakeholders. It will help if you arrange a commitment meeting with your stakeholders to review key information and make decisions about the solution. Such decisions in this step are focused on the successful implementation of the solution, which requires everyone to be fully committed. For example, how will the solution interact with the organization? What support will help the solution be successful on the job? What may get in the way of successful implementation?

The Sample Implementation Planning and Execution Items job aid provides a sample of key questions to ask during this step.

Once the group has agreed on and committed to those decisions, you can work out the design and delivery of the solution. Designing the solution is also a collaborative endeavor, and should involve people who will affect or be affected by the solution on the job. Delivery of the solution may be the task of one person or team, or it can be a collaborative effort.

Phase Three: Track and Confirm Alignment Results

When the solution has been in place for a time, follow up on how that solution is affecting the employees and the environment. You will conduct this follow-up iteratively, as necessary. This is an opportunity to gain ongoing stakeholder feedback about how the solution is driving current performance, what is helping successful performance happen, and what may be getting in the way of desired performance. You will check in as often as your agreed-upon follow-up plan describes, or more, to keep pace with any issues that may have surfaced and proactively address them so that the solution continues to effectively deliver the intended results.

Table 4 provides an overview of the technical aspects of phase three.

TABLE 4. TECHNICAL TASKS FOR PHASE THREE

Step	Technical Tasks
Discover Accomplishments to Date	Use your data sources to support reliable and complete information on the identified measureable indicators. Make sense of how the solution is influencing performance.
Determine Alignment to Date	Analyze solution feedback, including its influence on performance, obstacles, and opportunities for change. Determine where you are in regards to achieving your goals, objectives, and expectations.
Continue to Make Improvements	Share performance feedback findings with your stakeholders. Make modifications if necessary and continue to monitor the solution's effect on performance.

Discover Accomplishments to Date

In phase three, you will be looking for information that illustrates how employees are interacting with the solution and how it fits into the work environment. You started the process in earlier phases by determining the:

- goals, objectives, and requirements
- baseline, or current, performance
- performance expectations of your stakeholders
- criteria important to your stakeholders when making decisions about the problem.

In phases one and two, you also established the guides for evaluating the success of the solution now that it's being used on the job. These guides are:

- the measureable indicators to use
- where to find data about the indicators
- how to find the data about the indicators.

For example, if you're aligning to employee results, the measurable indicator to use might be the number of closed service calls. The source of data might be the quarterly service quality report, and you might choose to find the data through a review of the service quality report.

Determine Alignment to Date

In this next step, you will make sense of the information you discovered following up on the indicators. Your goal here is to determine how the solution is influencing performance. Again, these steps are iterative. Consistently check in on how employees are interacting with the solution so that you can monitor how the solution is influencing performance, determine what is helping its success or deterring it from success, and look for opportunities to make modifications, as necessary.

Your prior collaborations with your stakeholders helped you learn the signs of success and gave you insight into the criteria that are important to stakeholders when making decisions about performance solutions. Here are some sample questions for our previous example of alignment to employee results, with potential measures and analysis methods that may be applied.

To measure the number of service calls received and successfully closed, and their duration:

- Which shift closes the highest number of service calls?
- Which team members within each department close the highest number of service calls?
- Which days, weeks, or hours experience the highest number of closed service calls?
- Analysis: totals, average, range, standard deviation.

To measure the number of service calls successfully closed, customer satisfaction, and customer activity:

- What are the differences between financial and nonfinancial incentives on the performance of sales staff?
- What is the customer satisfaction level by customer level?
- Analysis: average and distribution of scores; range; standard deviation.

To measure relevant performance metrics:

- What are the projections for the long-term trajectory of the solution?
- Analysis: linear and logical regression.

Continue to Make Improvements

Your stakeholders are interested in knowing how well the solution is working. You have an interest in knowing this, too. By monitoring how performance is being influenced and communicating those influences, you are serving your stakeholders as a strategic partner and demonstrating the shared accountability for learning and talent development decisions and results. Your focus here is on continuous improvement. If solutions have not met expectations, this is an opportunity to find out why and take corrective actions to get back on track. The goal is not to point fingers or find fault; rather, it is to engage in discussions about how to continuously improve the performance of the organization and make data-supported and purposefully aligned decisions about those improvements.

If you have reached your expected results, remember that external and internal environments, dynamics, and conditions change all the time. Beware of complacency; continually review the relevance and value of the objectives, and the means for reaching them.

CONCLUSION

Research has shown that strategically oriented LTD functions offer significantly better performance results for their organizations. LTD professionals can be instrumental in the success of their organizations by proactively shifting their role from providers of learning products and services to strategic business partners. This requires a paradigm shift in how we view ourselves, our role, and our organization.

The essential skills for the new generation of LTD professionals include:

- system thinking—understanding relationships among the various parts of the organization
- strategic thinking—having a long-term perspective of results and what it will take to achieve them
- critical thinking—looking beyond the obvious and employing data, reason, and a healthy level of skepticism to reduce uncertainty and risk
- collaboration—working effectively with others to accomplish organizational goals.

The SCALE process incorporates these essential skills into nine key steps that help LTD professionals ensure alignment between solutions and strategic objectives, while providing a framework for demonstrating the LTD function's value.

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COLLABORATIVE DISCOVERY MEETING TOOL

Area of Focus	Sample Questions
Perceived Performance Problem	What brought the requestor to seek help? What exactly is being requested (for example, a predetermined solution or help in problem solving)? How important is this problem? Who is currently being affected, and whom will it affect? How? Who may affect the solution? How? What evidence has led stakeholders to their conclusions?
Solution Context and Environment	If a specific solution is being requested, in what ways will the solution be supported in the current work environment? In what ways may the current work environment impede the solution? What type of management support (for example, allocation of resources) exists for the solution?
Expectations	What does performance look like today? What results (or outputs) are currently being accomplished? What should performance look like after the solution is implemented? What tangible results should be delivered by performers? What criteria will be used to determine whether these results are satisfactory? Who will determine whether the results obtained are satisfactory based on these criteria? What evidence suggests that employees are clear about the performance expectation? What gaps exist between desired and current results?
Connections to Organizational Objectives	To what business objectives does the performance issue relate? How? What business goals will our selected solution affect? How and to what extent? What skills are required to fulfill the performance objective? In addition to skills, what else (resources, support, etc.) may be required to fulfill the performance objective?
Partnership	What is the best way for stakeholders to collaborate with or support the LTD team? What other partnerships are critical to the success of your solution? How do you ensure these partnerships are effective? Describe the collaboration process to your stakeholders. What can they expect from you, and what can you expect from them throughout the life cycle of the solution? What barriers or challenges might you encounter? How can you overcome these challenges?

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SAMPLE SOLUTION SELECTION CRITERIA CHECKLIST

Questions	Examples
How high of a priority is it to close this gap?	High—must address now Medium—may address later (add to a future phase, postpone) Low—Can ignore
What is the scope of the work involved in closing this gap?	Activities Deliverables Timeline
How important is closing the gap to management?	Very important Moderately important Unimportant
What are the risks of not closing the gap?	Risks to external and internal clients: Safety/Welfare Motivation Morale Performance Knowledge Information Goals
What is the magnitude of the gap?	Enterprise-wide Department/Division Team Individual
How many are affected by the gap?	Whole organization All/Portion leadership All/Portion management All/Specific team(s) Specific individuals
What are the financial costs associated with closing the gap? With not closing the gap?	High-level estimates of closing the gap High-level estimates of not closing the gap
What are the consequences of higher alignment levels?	Identify how closing (or not closing) the gap affects other alignment levels
What resources would be required to close the gap? What resources would be consumed if nothing is done?	Human resources Physical resources Financial resources Other

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SAMPLE IMPLEMENTATION PLANNING AND EXECUTION ITEMS

Questions	Examples
How will the solution be used on the job?	New or expanded work assignments
How will the solution be supported on the job?	Coaching Mentoring Feedback Job shadowing
What are the anticipated supports and barriers of the solution being used on the job?	Information Expectations communicated Resources Incentives
What are the employees' opportunities to use or integrate the solution on the job?	Immediate use of solution on the job Delayed use of solution on the job Frequent use of solution on the job Infrequent use of solution on the job
Who are the subject matter experts for this solution, as applicable?	Who will be available for supporting the solution on the job?
What is the plan for the design of the solution?	Who will lead the design of the solution? Who else is involved in the design? Who should be involved in the design?
What is the plan for delivering the solution? What is the deployment plan?	Who will lead the delivery of the solution? Who else is involved in the delivery? Who should be involved in the delivery?
How often will you follow up with stakeholders after the solution is implemented?	Testing of the solution design Testing of the solution delivery Immediately following implementation of the solution Certain intervals following implementation of the solution
How will you follow up with those who are using the solution on the job? How will you monitor its progress?	Observation Questionnaire Informal feedback from users Feedback from customers Focus groups
How will you communicate progress with stakeholders?	Email Face-to-face Quarterly status reports
What tasks are required to implement the solution?	Project tasks (e.g., design the solution, deliver the solution, test the solution, etc.)

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