

# WE LEARN

BEYOND TRAINING:

## Crafting learning strategies that transform organizations

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## INTRODUCTION

# The power of connection in learning strategy

In today's rapidly evolving business landscape, learning isn't just a nice-to-have—it's the lifeblood of organizational success. At WeLearn, we believe in the transformative power of connection. We're passionate about crafting learning strategies that not only align with business goals but also nurture human potential and foster meaningful connections.

Are you ready to elevate your role from a reactive order-taker to a visionary learning leader?

This guide is your compass, designed to help you navigate the exciting journey of crafting an actionable learning strategy. We'll explore WeLearn's proven framework, including our fourstep strategy and SOAP (Strategy on a Page) methodology, empowering you to become a true strategic partner in your organization's growth.

So, grab a cup of coffee, settle in, and let's embark on this transformative journey together. It's time to unlock the full potential of your learning initiatives and drive your organization towards a brighter, more connected future.



## SECTION 1

# Why do you need a learning strategy?

Imagine a workplace where employees are excited to learn, where knowledge flows freely, and where every learning initiative directly impacts the bottom line. Sounds like a dream, right? With a robust learning strategy, this dream can become your reality.

A well-crafted learning strategy is your secret weapon for creating a thriving organizational culture. It's the magnet that attracts top talent and the glue that retains them. It's the catalyst that builds capabilities, ignites engagement, and aligns learning initiatives with business outcomes. As an L&D leader, you hold the key to ensuring that learning drives business performance in ways you've never imagined.

In this section, we'll unpack the myriad benefits of having a learning strategy—from motivating employees to creating a values-driven culture.

You'll discover why shifting from a reactive role to a proactive, strategic L&D leader isn't just important—it's critical for your success and the success of your organization.



## Reflection questions

1. **Think about your current approach:** How do you align learning initiatives with business goals? Are there gaps you can identify?
2. **What are the biggest hurdles you face** when trying to position learning as a strategic priority? How might you overcome them?
3. **Look around your organization:** What opportunities can you spot to shift from order-taker to trusted advisor? How might this shift impact your role and your organization?

## Why even have a learning strategy?

- ☑ Attract and retain talent
- ☑ Develop people and capabilities
- ☑ Create a values-based culture
- ☑ Build an employer brand
- ☑ Motivate and engage employees



## SECTION 2

# Four steps to building a successful learning strategy

Ready to roll up your sleeves and dive into strategy creation? WeLearn's four-step process is your roadmap to crafting a learning strategy that not only aligns with your organization's goals but also resonates with the hearts and minds of your learners.

This isn't about creating a document that gathers dust on a shelf—it's about building a living, breathing strategy that adapts and evolves with your organization.

## WeLearn's four-step process:

- 1 Identify
- 2 Listen
- 3 Synthesize
- 4 Finalize

## STEP 1:

### **Identify the success construct**

First things first—let's define what success looks like. This step is all about aligning your L&D goals with the broader organizational objectives. It's time to put on your detective hat:

- ☑ Dive deep into your organization's goals. What are the key priorities for the next year? Five years?
- ☑ Analyze engagement data. What stories are your employees telling through their actions?
- ☑ Connect with key stakeholders. What does success look like from their perspective?

Remember, success for L&D isn't just about completion rates or satisfaction scores—it's about driving real business impact. How can your learning initiatives move the needle on what truly matters to your organization?

## STEP 2:

### **Listen**

Conduct interviews across all levels of the organization:

- ☑ From the C-suite to the frontline, every voice matters. Organize focus groups.
- ☑ Create safe spaces for honest, open dialogue about learning needs and aspirations.
- ☑ Deploy surveys. Cast a wide net to capture diverse perspectives and insights.

Listening isn't just about hearing words—it's about understanding the underlying needs, motivations, and challenges of your learners. What are they really saying? What aren't they saying? Your role is to be the ultimate learning detective, piecing together clues to form a comprehensive picture of your organization's learning landscape.



### STEP 3:



## Synthesize and codify

You've gathered a wealth of information—now it's time to make sense of it all. This step is where your analytical skills shine:

- ✓ Identify key trends and patterns in the feedback you've collected. What themes are emerging?
- ✓ Spot the gaps between current capabilities and desired outcomes. Where are the biggest opportunities for impact?
- ✓ Align your insights with the organization's strategic goals. How can learning bridge the gap between where you are and where you want to be?

This is your chance to weave together a compelling narrative about the role of learning in your organization's success story. How can you articulate this narrative in a way that resonates with both executives and employees?

### STEP 4:



## Finalize the plan

The finale is all about turning your insights into action. It's time to craft a plan that's both visionary and practical:

- ✓ Create a governance framework that clearly outlines roles, responsibilities, and decision-making processes. Who needs to be involved, and how?
- ✓ Develop a resource allocation plan. How will you prioritize initiatives and allocate budget and talent?
- ✓ Craft a communication strategy. How will you build excitement and buy-in across the organization?
- ✓ Establish measurement metrics and feedback loops. How will you track progress and adapt your strategy over time?

Remember, a great strategy is both a north star and a flexible roadmap. How can you build in mechanisms for agility and continuous improvement?



## Reflection questions

- 1. Take a moment to visualize success:** What does it look like for your learning initiatives? How does this vision align with your organization's broader goals?
- 2. Think about your listening strategies:** How effectively are you gathering feedback and insights from your audience? Are there voices or perspectives you might be missing?
- 3. Consider your current approach:** What concrete steps can you take to ensure your learning strategy is not just aligned with organizational goals, but is actively driving them forward?





# Four steps to building a successful learning strategy

## 1. Identify the success construct

- ✓ Review and align organizational goals
- ✓ Review key information (engagement survey, past learning data, etc.)
- ✓ identify key stakeholders
- ✓ Define metrics- focus on WIIFM

## 4. Finalize the plan

- ✓ Connect stories to strategy, input drives initiatives across org chart
- ✓ Establish governance
- ✓ Develop resources allocation, roles and responsibilities framework
- ✓ Create communication plan
- ✓ Develop risk and measurement plans

## 2. Listen

- ✓ Engage with stakeholders and audience
- ✓ Conversations across all levels
- ✓ Interviews, focus groups, 1:1s
- ✓ Ask for ideas, suggestions and solutions - focus on WIIFM

## 3. Synthesize and codify

- ✓ Represent their stories and needs deeply
- ✓ Align findings with strategic plan - identify missing and complementary drivers
- ✓ Connect purpose, people, and link to performance



## SECTION 3

# The SOAP approach (Strategy on a Page)

In a world of information overload, simplicity is your superpower. Enter SOAP—Strategy on a Page. This isn't just another framework; it's your secret weapon for communicating complex ideas with clarity and impact.

Imagine being able to articulate your entire learning strategy in a way that anyone—from the CEO to a new hire—can understand at a glance. That's the power of SOAP. It's not about oversimplifying; it's about distilling your strategy to its essence, ensuring that every stakeholder can grasp the what, why, and how of your learning initiatives.

## Let's break it down:



**Core values:** What principles guide your learning strategy? These are your non-negotiables, the bedrock of your approach.



**Guiding principles:** How will you approach learning? These are your 'rules of the road,' ensuring consistency across all initiatives.



**Strategic initiatives:** What key projects or programs will drive your strategy forward? These are your big bets, the initiatives that will create the most impact.

SOAP isn't just about creating a pretty document—it's about sparking meaningful conversations, aligning stakeholders, and turning your strategy into action. How can you use SOAP to not just inform, but inspire and mobilize your organization around the power of learning?



## Reflection questions

- 1. Take a hard look at your current strategy:** How well does it align with broader business objectives? Are there areas of misalignment you need to address?
- 2. Put yourself in your stakeholders' shoes:** What key messages should your SOAP communicate to resonate with their priorities and concerns?
- 3. Think big picture:** What initiatives, if successfully implemented, would fundamentally transform learning in your organization? How can you prioritize these in your SOAP?

# What's important to us

## Our dream

Describe your driving purpose, what is the reason you are in business, your ideal vision.

## Our principles

Describe the core values (3–5 usually) that you and your team align to and use as standards of conduct and excellence.

## Our commitment

Describe your team's passion, what you want to come to work to do and be.

## Guiding principles | How we work:

This is your elevator speech pulling together the key points above into a single statement.

### Our strategic initiatives

#### Key focus point

##### Target to reach focus point

Specific actions with measurable outcomes that will enable you to meet target and reach focus point.

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## SECTION 4

# Conversations lead to clarity

In the bustling world of corporate learning, genuine conversations are your compass. These aren't just casual chats by the water cooler—they're strategic dialogues that cut through the noise and get to the heart of what matters.



**We call them ‘clarity conversations’ for a reason.**

**They’re your opportunity to:**

- ☑ Uncover the critical needs that keep your C-suite up at night
- ☑ Understand the day-to-day challenges faced by managers and employees
- ☑ Identify emerging trends and opportunities before they become mainstream

But here’s the secret: it’s not just about asking questions—it’s about asking the right questions. How can you craft questions that unlock insights, challenge assumptions, and inspire new ways of thinking about learning?

Remember, every conversation is an opportunity to position yourself as a strategic partner. How can you use these dialogues to shift perceptions, build trust, and demonstrate the value of learning in driving organizational success?





## Reflection questions

1. **Take a hard look at your current strategy:** How well does it align with broader business objectives? Are there areas of misalignment you need to address?
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## Clarity conversation

- ☒ For each line of business, is there business objective that L&D has (or should have) an alignment to?
- ☒ Is there a 3–5–year plan for the units, organization?
- ☒ Are the competencies listed in the Client list aligned with role profiles?
- ☒ Is there a ratio of compliance vs. development in mind?
- ☒ Is there an intent and/or goal to educate Client clients/customers?
- ☒ What work is being done at the organizational level to identify critical priorities and areas of focus?
- ☒ What is the operational metric(s) used to measure this?
- ☒ What is a key opportunity to capitalize on?
- ☒ How is “proficiency” defined in the different areas?
- ☒ What are your thoughts on remote learning options vs. in-person?
- ☒ What would the top 1–3 priorities be for each department?

## SECTION 5

# Governance and prioritization: managing the workload

In the dynamic world of L&D, feeling overwhelmed is all too common. But what if you could transform that flood of requests into a focused stream of high-impact initiatives? That's the power of effective governance and prioritization.

Governance isn't about creating bureaucratic hurdles—it's about establishing clear, transparent processes that empower you to say "yes" to the right projects and "not right now" to the rest. It's your shield against the tyranny of the urgent, ensuring that your team's talents are focused on initiatives that truly move the needle.

## Here's how to make governance work for you:

- 1 Develop a clear, user-friendly intake process.**  
How can you make it easy for stakeholders to submit requests while capturing the information you need to make informed decisions?
- 2 Create a prioritization framework aligned with your strategy.** What criteria will you use to evaluate requests? How will you weigh different factors like business impact, resource requirements, and strategic alignment?
- 3 Communicate, communicate, communicate.**  
How can you ensure transparency in your decision-making process, helping stakeholders understand why certain initiatives are prioritized over others?

Remember, effective governance isn't about saying "no"—it's about saying "yes" to the projects that matter most. How can you use your governance structure to elevate the strategic importance of learning in your organization?



## Reflection questions

- 1. Audit your current approach:** What governance structures do you have in place to manage learning requests? Are they serving you well, or are they due for a refresh?
- 2. Sharpen your prioritization skills:** How do you currently decide which projects to take on? What criteria could you use to more effectively prioritize based on business impact?
- 3. Define your boundaries:** What does "in scope" mean for your L&D function? How can you communicate these boundaries clearly to stakeholders?

# Example Learning Organization

scope defined and outlined



## Learning team scope (organizational level)

- ✓ Learning needs analysis
- ✓ Content curation
- ✓ Course/curriculum development
- ✓ Facilitation
- ✓ Program development
- ✓ Marketing and communications metrics & reporting
- ✓ Technology administration
- ✓ Onboarding
- ✓ Performance, development, and coaching frameworks
- ✓ Vendor management
- ✓ Organizational budget



## Learning council/L&D champion scope

- ✓ Learning needs analysis
- ✓ Content curation
- ✓ Course/curriculum development
- ✓ Facilitation
- ✓ Program development
- ✓ Marketing and communications
- ✓ Metrics & reporting
- ✓ Onboarding



## Out of scope

- ✓ Performance improvement
- ✓ Plans HRIS management
- ✓ Individual performance and development coaching
- ✓ Policy enforcement

## SECTION 6

# Measure, monitor, and adapt: the continuous improvement cycle

In the ever-evolving landscape of business and learning, standing still is moving backwards. Your learning strategy isn't a set-it-and-forget-it document—it's a living, breathing roadmap that should evolve with your organization.

Measurement isn't about producing reports that gather dust—it's about gaining actionable insights that drive continuous improvement.

## Here's how to make measurement work for you:



### **Align your metrics with business outcomes.**

How can you demonstrate the direct impact of learning initiatives on key performance indicators?



**Look beyond completion rates.** What metrics can help you understand not just participation, but application and impact?



### **Create feedback loops at every level.**

How can you gather insights from learners, managers, and executives to paint a comprehensive picture of learning effectiveness?



Monitoring isn't about micromanagement—it's about staying attuned to the pulse of your organization. How can you create systems that allow you to spot trends, identify challenges, and seize opportunities in real-time?

Adapting isn't about chasing every new trend—it's about making thoughtful, data-driven decisions to continuously refine and improve your strategy. How can you build a culture of experimentation and learning within your L&D function?

- ☑ Alignment is key - performance success
- ☑ Ask and involve the community
- ☑ Be honest about deliverables
- ☑ Measure, monitor, and manage



## Reflection questions

- 1. Evaluate your metrics:** How do you currently measure the impact of learning initiatives? Are these metrics giving you the insights you need to drive improvement?
- 2. Connect the dots:** What business metrics are most relevant to your learning strategy? How can you more closely align your L&D metrics with these key performance indicators?
- 3. Close the loop:** How can you ensure continuous feedback and improvement in your strategy? What mechanisms can you put in place to regularly review and refine your approach?

## CONCLUSION

# Driving organizational success with learning

Congratulations! You've embarked on a journey to transform learning in your organization. By embracing strategic thinking, leveraging tools like SOAP, and focusing on continuous improvement, you're positioning yourself as a key driver of organizational success. Remember, this transformation doesn't happen overnight. It's a journey of continuous growth, learning, and adaptation. But with each step, you're not just improving learning outcomes—you're shaping the future of your organization.

## As you move forward, keep these key principles in mind:



**Stay connected:** Never lose sight of the human element in learning. How can you ensure your strategy nurtures connections and empowers individuals?



**Remain curious:** The learning landscape is always evolving. How can you stay at the forefront of trends and best practices?



**Be bold:** Don't be afraid to challenge the status quo. How can you push the boundaries of what's possible in corporate learning?

Now, it's time to take action. Start with those clarity conversations. Align your learning initiatives with business strategy. Measure your impact and never stop improving.

Remember, you're not just a learning professional—you're a catalyst for transformation, a driver of success, and a shaper of organizational culture. Embrace this role with confidence, knowing that you have the tools, insights, and passion to make a real difference.



# WE LEARN

Your journey doesn't end here—it's just beginning. Join the community of forwardthinking L&D leaders who are driving business success through thoughtful, human-centered learning strategies.

Visit WeLearn's website for more tools, resources, and insights to support you on this journey. Connect with peers, share your experiences, and continue to grow and evolve as a learning leader.

Together, let's reshape the future of learning and development, one strategy at a time. Are you ready to lead the change?





# WE LEARN



## About WeLearn

WeLearn is a learning services, consulting, and custom content provider that creates behavior-changing solutions alongside you. Our commitment? Exceptional partnerships and exceptional learning experiences. No matter what.

Based in Chicago, WeLearn serves global corporations including Fortune 500 companies.

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