6 Steps for Choosing an Agile Learning Partner:
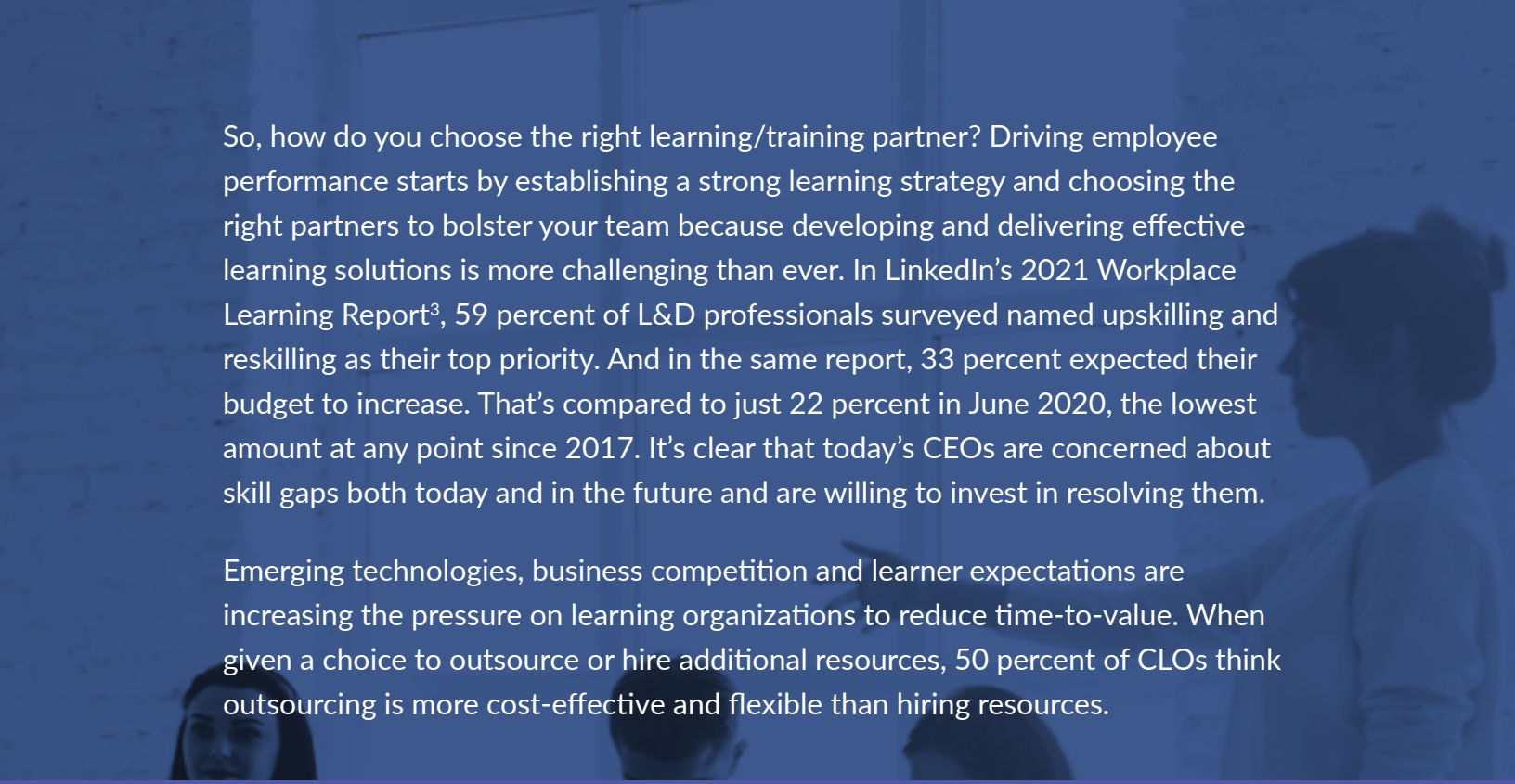
A Complete Buyer's Guide

CGS®

Prior to the digital age, Learning and Development (L&D) was seen as a nice-to-have, but not critical, function within a company. Amid global disruptions and digital transformation that seems to speed up continually, enterprise L&D is now a must-have.

Today's organizations have gone through an average of five major firmwide changes in the past three years—and nearly 75 percent expect to increase the types of major change initiatives they will undertake in the next three years. While businesses are undergoing more frequent big changes, about half of change initiatives fail, and only 34 percent report clear success. Some 16 percent of change initiatives report mixed results.[1]

In 2020, 26 percent of companies, on average, mostly or completely outsourced LMS operations/hosting, so learner support and LMS administration largely were handled in-house. However, more instruction and facilitation were outsourced than handled in-house (61 percent vs. 39 percent).[2] If your organization aspires to tackle disruption head-on, you already understand the importance of moving from a reactive to a proactive mindset. Enterprises leverage external providers to deliver more learning than internal resources can provide, to gain access to more technically advanced and in-depth learning expertise while controlling costs and to supplement internal resources to make learning resources available on an as-needed basis.
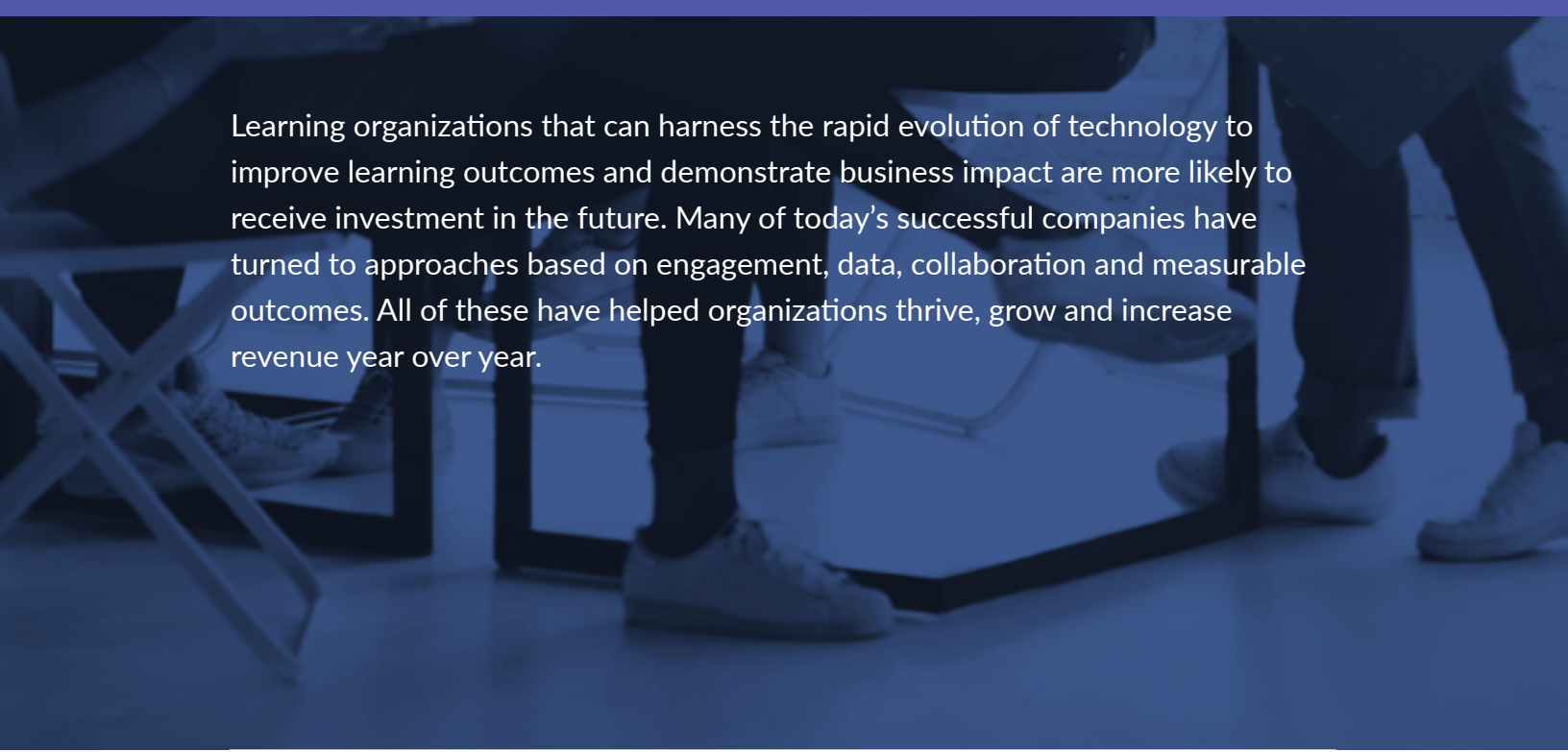
So, how do you choose the right learning/training partner? Driving employee performance starts by establishing a strong learning strategy and choosing the right partners to bolster your team because developing and delivering effective learning solutions is more challenging than ever. In LinkedIn's 2021 Workplace Learning Report[3], 59 percent of L&D professionals surveyed named upskilling and reskilling as their top priority. And in the same report, 33 percent expected their budget to increase. That's compared to just 22 percent in June 2020, the lowest amount at any point since 2017. It's clear that today's CEOs are concerned about skill gaps both today and in the future and are willing to invest in resolving them.

Emerging technologies, business competition and learner expectations are increasing the pressure on learning organizations to reduce time-to-value. When given a choice to outsource or hire additional resources, 50 percent of CLOs think outsourcing is more cost-effective and flexible than hiring resources.

> "Training needs [are] constantly changing.
> In-house expertise becomes static and confined to specific areas."
>
> – Fortune 500 Technology CLO, IDC survey of Chief Learning Officer magazine's Business Intelligence Board

Learning organizations that can harness the rapid evolution of technology to improve learning outcomes and demonstrate business impact are more likely to receive investment in the future. Many of today's successful companies have turned to approaches based on engagement, data, collaboration and measurable outcomes. All of these have helped organizations thrive, grow and increase revenue year over year.

A crucial element in developing an effective strategy is finding an experienced and expert learning partner to be a trusted business partner and thought partner that can guide you through the process and deliver against expectations.
And this partner has to be the right fit for your business.

To help you find that partner, follow this six-step path

1 Take Stock of Where You Are and Where You Want to Go

2 Set Clear Objectives and Identify Capability Gaps

3 Gather Requirements and Ensure Buy-In

4 Establish a Strong Partnership

5 Ask to See the Proof Points – and Don't Settle

6 Stay lean and Agile

Step 1: Take Stock of Where You Are and Where You Want to Go

In its State of the Global Workplace, Gallup reports[4] that the percentage of actively disengaged employees is up slightly in the U.S., moving from 14 percent in 2020 to 15 percent through June 2021. Actively disengaged employees report unpleasant work experiences and are generally poorly managed. In the same research, 36 percent of U.S. employees, 20 percent globally, are engaged in their work and workplace.

Workplace learning and career pathing are great ways to engage or re-engage employees. Some 94 percent of employees[5] report they would stay at a company longer if it invested in their career. Yet the number one reason employees feel held back from learning is they don't have the time.

Where and how does learning fit into your company culture? Before you can choose a learning partner, you need to figure out what each line of business needs to achieve and gauge each division's existing approach to learning. And while we know you want the best, studies show[6] that only 31 percent of organizations truly have a culture of learning.

In one Human Capital Institute survey, 74 percent of companies noted that developing a learning culture was an upcoming priority area, with a learning culture defined as one that had the following sets of values or beliefs:[7]

- A growth mindset is to be encouraged (abilities are developed through hard work)

- Learning is a process, not an event

- Employees enjoy challenges

- Learning agility is a valued competency in all employees

- Risk-taking should be supported

- Mistakes are something from which we learn

Yet only 11 percent of companies surveyed embodied five or more of these characteristics. Among that 11 percent, however, the wealth of positive attributes was impressive, with:

89% Seeing L&D as a value to the organization

74% Saying employee performance feedback occured continuously[8]

74% Seeing L&D as better aligned to business objectives

54% Being confident in their high-potentials

51% Having a strong leadership pipeline

In their study, "Is Yours a Learning Organization," David A. Garvin, Amy C. Edmondson and Francesca Gino[9] take the process a step further by encouraging companies to answer the following questions:

- Is your work environment supportive of learning?

- Have you established clear, concrete learning processes and practices?

- Does your company's leadership actively support your learning culture?

These questions get to the root of what it means to establish a learning strategy that aligns with your culture. In answering these, you open a window into your workforce's ability to embrace novel solutions to new and existing problems and determine which approaches need to come from inside or outside of the company hierarchy.

The insights from this self-assessment are also critical to enabling an organization's Talent Management Strategy. Developing employees for career moves and promotions is significantly dependent upon the learning philosophy and culture within the organization.

Step 2: Set Clear Objectives and Identify Capability Gaps

This step focuses partly on what your company hopes to accomplish through learning and development (for individual lines of business and companywide). This phase should also center on maximizing the effectiveness of the learning and development program by:

- Adhering to well-defined timeframes

- Establishing success metrics

- Creating efficient communication

- Defining clear processes

WORKSHEET A: SET CLEAR OBJECTIVES

1. Align with Business Strategy and Identify Capability Gaps

For each business goal, your L&D goal should support its outcome and success. Not all business goals may have an L&D goal, but all L&D goals should point toward a business goal. Also, for each business goal, measure the capability behind its success:

	Business Goal	Learning and Development Goal	Skill, knowledge or mindset needed	What's the current skills level?	What are L&D's needs to meet this goal?	Create a plan to reskill/ upskill and accomplish the goal	Deliver on the plan	Evaluate the results and identify any gaps
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								

2. Design Your Learning

Most corporate learning is done through a combination of in-person sessions and eLearning modules, such as interactive courses, videos, etc. However, do not be afraid to embrace newer techniques and technologies. In some cases, a quick burst of learning through text-based courses or an immersive experience using augmented reality technology can help learners gain and retain knowledge faster. Try answering these questions for each need as you design your learning:

	Skill or Knowledge Need	Who is the audience?	What's the best learning modality to employ?	Is it accessible? Measurable? Applicable?	Estimated cost	Success Metrics
1.						
2.						
3.						
4.						
5.						

3. Establish Governance

Lines of business, Talent/HR and Learning staff (if separate teams) should co-own the company's Learning strategy, academy and other elements. Ensure you engage often with stakeholders to have buy in and sponsorship, so the learning strategy proposal aligns with needs and enables the business to succeed. Effective governance involves clear and open communication, regular updates/meetings on progress of the learning strategy, being clear on key decisions needed by leaders and any other call to action you may need from stakeholders. Activities could include:

- Weekly/biweekly status touch bases/meetings

- Key communication updates and reminders from project stakeholders

- A Slack/MS Teams/SharePoint project site for easy collaboration, filesharing and interaction

Step 3: Gather Requirements and Develop Learning Solutions

You're nearly halfway there! You know where you stand and have created a preliminary set of learning goals with each line of business, now you need to ensure that the divisional goals align with and address the larger needs of the company. An expert partner should be able to help you drive this process forward by objectively doing real discovery, without making assumptions about how things are done and who is doing the work based on job titles, and outline where and how things actually get done within your organization. Other important aspects of the collaboration process include:

Weekly/biweekly status touch bases/meetings

- Key communication updates and reminders from project stakeholders

- Making sure that the learning function feels locally owned (and truly empowers employees)

- Working backwards from the business problem to develop useful learning

- Not understanding the impact external/environmental factors have on your business

- Building a robust rewards system

Collaborating also identifies skills gaps in the organization with respect to peers inside and outside the company and helps your learning partner design an effective workforce performance program. In addition, this joint approach gives rise to a blended curriculum that combines formal and digital learning with on-the-job training and alternative approaches such as coaching. This results in learning programs with a wider array of touchpoints that connect with more employees at one time and have an effect at the institutional level as well.

Build, Pilot, Deliver and Scale

Once needs are clearly defined and direction is established, it's time to build out the learning modules. Here's where the magic happens! Effective and memorable learning is where creativity, L&D expertise and brainy engineering merge with a responsive LMS or delivery mechanism that puts learning in employees' hands anytime, anywhere.

Some L&D projects can be piloted to smaller groups, then revised before going more global in scale. With each successful iteration, you can scale the learning for bigger goals and better results.

Your learning partner needs to have valid L&D credentials. The prospective partner should have experienced experts on staff with all the skills required to complete your learning project, including instructional designers, artists, writers and editors. **And don't underestimate the value of design: Quality instructional design is essential to developing and delivering impactful learning experiences**. This team must be able to address diverse learning strategies and delivery methods: Technology Selection, Content Development, Employee Motivation, E-Learning Business Process Design, Financial Analysis and Mobile as well as an ability to fit in with your business culture. In addition, potential candidates should be able to show a clear return on investment from past work they've completed.
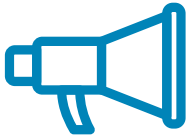
Measure Impact

After a set time (established in your goals), using an enterprise-class LMS system or other metrics, you can go back and measure how the program has performed and benefits the business has reaped for each L&D goal in the right column of Phase 1. Depending on your answers to these questions, the success level of the program, you can then go back and retool/refresh and continue or change course as needed.

Learning and Development Goal	How effectively does it support the organization's priorities?	How well does it help colleagues build the needed mindsets, skills and/or expertise?	To what extent does learning strengthen the overall health of the organization?	How well does it help colleagues excel in their role while maintaining a healthy work-life balance?	Success Metrics
1.					
2.					
3.					
4.					
5.					

Step 4: Establish a Collaborative Partnership

1. Partners with **good communications** strategies should have a deep track record showcasing how they've helped promote knowledge sharing across client organizations. Your partner should help you amplify and broadcast successes, build excitement about the learning experience and help new, winning approaches spread deeper into the fabric of each line of business. Additionally, qualified learning partners will have well-documented records of how effective their client communications have been over the years.

2. **Digital experience delivery** makes or breaks firms' ability to engage today. Consumers, in general, have come to expect a high-quality digital experience from service and product providers across industries—retail, healthcare and entertainment, among others. A "marketing quality level" of digital experience is permeating the digital experience and changing the expectations of both consumers and learners. Consumer expectations spread to other online experiences, including eLearning, where learners expect high-quality graphic design, interactivity, fast-paced video and integrated audio elements. Augmented reality (AR) is another digital technology that puts hands-on, immersive learning at your learners' fingertips. AR uses a learners' tablet or smartphone to present digital overlays (3D models, videos, cues and other instructional information) in real-world environments to foster learning anytime, anywhere, on just about any device. Learning organizations that evolve new techniques like AR to create a more robust digital experience are able to deliver a more engaged learning experience.

3. **Data and analytics** are enabling the delivery of more personalized online experiences. Today's software applications blend data from systems of record (e.g., HR, CRM, consumer databases, data warehouses) with systems of engagement (e.g., email, collaboration, social and learning systems) to provide more opportunities than ever before to create custom-tailored and targeted learning solutions that efficiently meet an individual's learning objectives.

4. Your ideal partner should also have **clear and defined processes in place**, as well as extensive project-management experience, that you can review and discuss before, during and after the project is completed. Furthermore, you will want to work with a partner that has extensive experience designing and developing learning models that are more than one-size-fits-all programs. The partner's processes also need to complement your internal culture and be based on the latest, most-effective models, technologies and designs.

WORKSHEET B: Activities and Qualities of the Best Learning Partners

Below you'll find a checklist of best-in-class processes and traits that are common to the best L&D providers. You can research the company's website and press materials for some of the answers, but do not be shy to ask representatives about these, as well. Place a check or an X in Yes and No for each question, count them, and the sum at the bottom will inform you of this company's level of performance.

Quality, process or activity - Does the company...

                                                  Yes No

effectively and pragmatically measure learning effectiveness?

assure consistent quality of faculty and instructional designers?

ensure content expertise?

provide training customized to your industry?

provide training on specialized applications as they are used inside your firm, not just out-of-the-box training?

offer curricula that reflect the pain points of your industry and its specific requirements?

develop flexibility and installed capacity to provide training at any time?

Quality, process or activity - Does the company... (cont'd)

Yes No

have a good grasp of current learning trends and technology, as
well as excel at driving new initiatives?

bring new ideas, talent and methods of execution to the table?

have creative chops and a strong track record on engagement?

have expertise in multiple learning and development strategies?

collaborate with your teams and business stakeholders through
all phases of design and development?

help with execution and support you in building robust analytics
and business intelligence programs?

most importantly, bring onboard an excellent team?!

GRAND TOTAL

Step 5: Ask to See the Proof Points and Don't Settle

This next-to-last step is where you need to take all the information you've gathered during the research phase and investigate its veracity by:

- Meeting with potential partners for an assessment

- Asking questions about their learning philosophies and processes

- Consulting with them about their business culture and compatibility with your own organization

- Establishing quality and knowledge matters - explore the provider's subject matter expertise

- Referencing their credentials and track record to confirm relevance and fit

You will want to observe these potential partners in action as they walk you through their recommendations for aligning learning strategy with business strategy. It's also a positive if the potential learning partner has been in business for a relatively long time (no less than 5 years). **Longevity and retention rates are good indicators of a company's success at establishing solid client relationships as well as meeting the needs of those clients**. It's also worthwhile to learn:

- Which clients they've worked with repeatedly

- What the recommended team structure would look like

- Whether the staff includes subject matter experts _and_ generalists[10]

You'll also gain insights into the partner's skill set by reviewing its portfolio of past and present work: The success stories. This will provide a clearer picture of the services the partner provides. It will also give you additional insight into the company's processes as you look more deeply into past clients' projects from the initial phases of design and development through the implementation, reporting and review stages. You'll get a better understanding of the level of detail and quality the company provides for its clients as well. Nearly 70 percent of CLOs now report learning expertise is among the top criteria when selecting a provider. And a truly exceptional partner will go beyond the basics to deliver optimal value through the means in Worksheet C.

WORKSHEET C: Optimal Values in L&D

Use this form to evaluate the value and reach of your potential Learning partner. How do they rate in the following? Enter a score or number where indicated.

RATING CATEGORY

NUMBER OR SCORE

Net Promoter Score (NPS)

After each project completion, clients are asked to answer one simple question: "On a score of 0–10, with 10 being extremely likely and 0 being not likely at all, how likely is it that you would recommend your partner to a friend or colleague?" What's the provider's average?

Growth in number of eLearning projects

Delighted clients are more likely to return for additional help with learning initiatives and projects in the future. Your ideal partner should measure success on being able to support clients on a long-term basis.

Number of new clients

Satisfied clients are more likely to recommend a partner to other departments within their organizations or to their peers in other enterprises.

Client references

Trusted advisors view client references in the form of case studies, white papers, co-presentations and video testimonials as being a significant demonstration of their ability to delight clients. Additionally, client references can often be used to build awareness of excellent learning programs.

Measured success

A partner that helps clients to develop and implement learning solutions can drive a higher level of business value—increased revenue, reduced operating costs, improved quality, etc. A trusted partner works with clients to determine their business goals and to identify ways they can support clients in measuring the impact of their solutions.

Step 6: Stay Lean and Agile!

Today, more than 52 percent of organizations are using Agile approaches to manage the majority of their software development projects. Scrum and its variants are the most popular Agile methodologies in use. Companies implement Scrum to accelerate time-to-market, increase productivity and improve their adaptability.

Best-in-class learning partners combine core Agile principles, Scrum, best practices for instructional design and lean principles championed by the authors of *The Lean Mindset*, Tom and Mary Poppendieck, to create a lightweight approach to continuous improvement. This approach provides transparency, reduces time-to-value and offers greater alignment with client expectations over the course of a project. The principles of lean development are:

- Eliminate waste. Anything that does not add value in some way to the learning solutions delivered to clients is considered waste.

- Build in quality. Procedures are in place to prevent defects and issues from entering the process.

- Amplify knowledge. The client and the team create critical knowledge by experiencing the solution themselves.

- Decide as late as possible. Deliver better results by taking an options-based approach. Make decisions based on facts learned through the development process rather than uncertain assumptions and predictions.

- Deliver as quickly as possible. The sooner a solution (or part of a solution) is delivered with quality, the sooner clients are able to provide feedback that the team can incorporate into the work for the next week.

- Empower the team. An empowered team attracts bright, creative people who collaborate to deliver wildly successful deliverables.

- Optimize the whole. Observe the end-to-end value stream that clients experience from initial contact through to delivery of the solution and subsequent follow up.

Now that you've done all the legwork necessary to learn about who would make an ideal learning and development partner for your organization, the final step is to choose. And thanks to your detailed self-assessment, research and investigation, you should have little trouble weighing the strengths and weaknesses (if any) of each candidate. In fact, the choice should be clear.

For a clearer picture of why CGS Enterprise Learning has been a trusted workforce performance partner to top-performing companies for more than 30 years, how CGS goes about scaling people, processes and performance, why CGS Learning has a 95 percent customer return rate, and what else CGS Enterprise Learning Services have to offer, please contact learning@cgsinc.com for a free assessment.

ABOUT CGS

CGS Enterprise Learning has more than 30 years' experience providing innovative learning solutions, deployed through 15 international offices that provide courses in over 20 languages. Our services support more than 1.4 million learners globally, and we retain 95 percent of our customers. CGS has been awarded a top-20 spot on several Training Industry's Lists for 9 consecutive years.

We Are Here to Help

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