IAB GUIDE TO LEARNING & DEVELOPMENT BEST PRACTICES

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Expert guidance from the IAB Learning & Development Council to help you improve and benchmark your company's training strategy.

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Introduction

The sales team at a leading ad tech platform is struggling to meet its goals. The company is preparing to go public, and has recently released a new product suite. Product experts have led product trainings, but sales aren't closing. Confidence is low, pressure is high, and many feel additional training is needed—but how can the sales team spend more time away from selling, when time is running out?

This is the type of problem that a Learning & Development (L&D) team can help prevent. Well constructed L&D programs can enhance organizational performance regardless of whether program goals are directed towards improving product knowledge, technical skills, sales effectiveness or leadership skills.

Companies operating in the media and marketing industries have an acute need to implement effective Learning & Development solutions. Faced with high employee turnover rates[1], an increasingly competitive landscape, technological advancements that have disrupted traditional ways of doing business, and acquisitions that throw different company cultures and disciplines together; They must continue to operate efficiently to execute on a cohesive vision. An intelligent L&D strategy can make the difference between success and failure.

This paper examines key L&D best practices gathered from the IAB learning and development community, in order to provide advice to senior leaders on implementing an L&D function within their organization, and advice to L&D practitioners on improving the quality and impact of their learning programs.

"Learning today has become a business critical priority for driving revenue growth, increasing skills, improving the leadership pipeline, and enhancing employee engagement"

Developing Your Learning & Development Strategy

Learning today has become a business critical priority for driving revenue growth, increasing skills, improving the leadership pipeline, and enhancing employee engagement. Here are some key considerations to help you assess your current learning environment and implement a corporate learning and development strategy.

Execute a Needs and Skill Gap Analysis that Aligns Learning Plans to Business Priorities

An important first step is to evaluate your organization's business needs, and then align your L&D strategy to meet those needs. Three types of assessments used by L&D Professionals are:

[1] http://www.ana.net/blogs/show/id/37368

- Organizational assessment: Provides a big picture understanding of the skills, knowledge, and abilities required for employees to meet company-wide strategic objectives. L&D can then make recommendations to address any gaps.
- Role assessment: Highlights the tasks, skills, and knowledge required for individual roles within the company. L&D can then implement team or role specific training programs/certifications, such as new hire programs.
- Program assessment: Determines the tasks, skills, and knowledge necessary to achieve specific business initiatives. L&D then develops training programs specific to those needs.

Employ the Right L&D Systems and Tools to Scale and Measure Training

Selecting the right automated tools can help with distributing materials, providing performance feedback, and measuring training impact. A few tools that companies can purchase to deliver and track training include learning management systems (LMS), content management systems (CMS), knowledge bases, and online coaching platforms. Tools built internally to track training participation can include anything from simple spreadsheet documents to custom-built CRM dashboards. Be sure when evaluating or purchasing systems or tools that there are planned resources in place to support the technology implementation and its on-going maintenance / use.

Build a Culture of Learning

Opportunities for learning are essential to employee engagement, growth & retention. The main objective of a company's L&D strategy is often to support career development for employees. This can be done via career mapping, formal training events or programs, informal peer-to-peer or team-driven training, and performance coaching. There are two key components to establishing a company culture where learning can thrive. The first is executive leadership buy-in and support for training resources and programs. The second is holding employees accountable for participating fully in training programs and meeting learning targets.

Creating & Evaluating Successful Learning Programs

Well designed learning programs can reduce employee ramp up time, minimize knowledge gaps, fulfill compliance requirements, and help drive overall company success. Learning professionals can create programs that provide a consistent onboarding experience for new hires and/or external clients; they can develop programs to ensure a baseline of industry knowledge across teams; and they can evangelize the company's culture by facilitating trainings that express the values and priorities of the company (e.g. leadership training, diversity and inclusion training, etc.)

These programs can be as simple as a single training event, or more extensive, such as an onboarding program that spans several months or a continuing education curriculum that an employee can participate in on an ongoing basis. The content of these programs can consist of in-person classroom sessions, live webinars, simple video recordings, well produced e-learning courses, and written assessments, hands on exercises, or quizzes. Many effective programs are "blended," meaning they blend together online digital media and traditional classroom experiences.

How to Conduct a Needs Analysis

Needs analyses can be conducted as a Q&A with the appropriate business owner, to determine the objectives and scope of a training project. Example questions asked in a needs analysis:

- What is the current problem you would like the training program to help solve? What led to this request for training?
- What learning needs to be accomplished, or what skills need to be developed? What should learners be able to do after the training that they weren't able to do before?
- What would a successful program outcome look like? How can we plan to measure program success?
- What is the deadline for completing training?
- Who is the training audience, where are they located, and how many students are there?
- What is the best way for this audience to consume learning?
- Do you have any expectations regarding training format, e.g. classroom training, webinar, eLearning, pre-work, testing?
- What prior training materials on the topic exist / has the audience already received training?
- What topics need to be covered in the training?
- Who are the SMEs (subject matter experts) for these topics to consult during training development?

Once a needs analysis has been completed, a formal proposal can be submitted to the business owner for approval, and training resources can be aligned. Even if you are able to answer most of these questions yourself, it is important to confirm your assumptions with key stakeholders.

Establish Program Goals & Learning Objectives Based on Business Outcomes

A critical first step when planning a training program is to establish the business outcome the training is intended to support (examples include providing better customer service or increasing sales.) These goals will define the learning objectives of the program. Learning objectives define the new behavior learners are expected to perform once training is completed.

Engage Key Stakeholders and SMEs

Learning and Development teams should work with their management/leadership teams to finalize program goals and learning objectives. Establishing stakeholder sponsorship can be crucial to program success, and getting on the same page with leadership as to how success should be measured can help set expectations and define program KPIs.

In addition to engaging with leadership, attracting the support and participation of subject matter experts within teams is vital, as these are the stakeholders that are best able to represent the business impacted by the training program. Look for subject matter experts that can inform the validity of the training content, or create a pilot group of stakeholders to test the training program before it is released to broader teams.

Establish & Track Program KPIs

It is essential to identify how program success will be measured prior to actually delivering the training. Program KPIs (key performance indicators) can include generic metrics that could be applied to any training, such as program reach (i.e. program participation / attendance, or percentage of teams/departments) or the degree of trainee or business owner satisfaction. However, program specific metrics related to business outcomes can provide a more concrete picture of success. These could include a change in skill or knowledge level as measured by an assessment, or improvements in on-the-job performance, such as a reduction in errors or an increase in sales for a specific product.

Identifying KPIs and a way to measure them can be as simple as asking business owners "What will participants need to do after this training for you to know that training was successful?"

If their answer is:

- They should speak knowledgeably about our products to our customers

Then:

- a knowledge test and/or a customer survey might be an appropriate method for measurement.

If their answer is:

- They should effectively pitch a new product,

Then:

- Implementing a rubric for evaluating product pitches might be the best measurement option.

If their answer is:

- They should complete procedures correctly,

Then:

- A performance checklist and/or supervisor survey might be the best measurement options.

Once you have determined the most effective measurements strategy, keep tracking systems or documents up-to-date and share them regularly with key stakeholders.

The Kirkpatrick Model

The most widely recognized model for evaluating training success is the Kirkpatrick Model. This model evaluates successive levels of learning impact:

- **Level 1 – Reaction.** Did participants enjoy the learning activity? Typically collected via evaluation forms or surveys.
- **Level 2 – Learning.** Did participants learn the basic concepts or facts outlined in the learning activity? Typically collected via quizzes or exams.
- **Level 3 – Behavior or Application.** Are participants able to apply what they learned on the job? Typically analyzed via manager or peer observation of employee behavior.
- **Level 4 – Results.** Did business outcomes improve based on application of the learning? Typically analyzed by changes in business results, e.g. increased sales.

  Some have recommended adding a fifth level to capture return on investment:

- **Level 5 – ROI.** Does improvement in business results outweigh the cost of the training program? Typically evaluated via financial analysis.

Address a Variety of Adult Learning Preferences

An ideal learning program is flexible enough to accommodate different learning styles. A learning style is the preferred way in which an adult learner prefers to acquire new concepts. Few individuals use one style exclusively; however, most of us have a dominant style. Some learners are visual, some verbal, and some physical. Some people like to read, others learn best by listening, and others require hands-on learning to grasp concepts. Try to allow for more than one learning style when developing your training content.

Additionally, adults in the workforce have different needs than adults in a traditional academic learning environment. These include:

- The need to relate training to real-world experiences and relationships. Engagement increases when you help learners visualize or plan real-life applications for the training material.
- The need for task-oriented training. Adults want to feel actively involved in the learning process, and this means providing interaction and feedback as part of training.
- The need for continuous learning. Learning is an ongoing process, rather than a single event. Offer a path for continuing education or schedule follow-up mentoring sessions with other staff members.

Have a Communication Strategy that Ensures Participation

You must remember to structure your training delivery in a way that's accessible—taking into consideration different time zones, whether live trainings vs. online training is appropriate, etc. However to ensure participation, you must also market and promote your training effectively. If possible, partner with your marketing or internal communications team to develop a plan that highlights the value of the training to its target audience, and always give ample time for scheduling reminders and follow ups.

Have a Plan for Continuous Improvement

Unless you are creating a training event that occurs only once, there will likely be opportunities for improving programs after they are launched. Plan for a means to collect learner feedback on the program or content, and identify ways in which feedback can be incrementally incorporated.

Investing in a Learning & Development Team

Learning and Development teams are essential for assessing and determining learning needs, as well as creating training content and implementing educational programs. When you're ready to employ Learning & Development resources, here are a few things to consider.

Decide on Key Areas of Emphasis

When investing in Learning & Development resources, each organization must consider first which types of educational programs are most crucial to their bottom line. This includes prioritizing training categories such as:

- Sales Enablement (empowering sales teams with the industry and product knowledge needed to reach revenue targets)
- Product or Technical Training (empowering teams with the systems and product training needed to execute their jobs well and without error)
- Professional Development (leadership skills, management training and other soft skills development programs)
- Customer Training (educating customers on the use and value of a company's products)
- Vendor or Partner Training (educating company partners, affiliates or outsource vendors regarding how to accomplish jobs they've been tasked with)
- Other areas of learning that may be unique to the organization.

Identifying the learning needs you plan to solve will help you better evaluate what type of personnel, budget and timeline are needed, as well as where the learning function should reside in your organization.

> "90% of executives say L&D is a necessary benefit to the company."
>
> *– LinkedIn 2018 Workplace Learning Report*

Decide Whether You Need a Short-Term Contractor or an In-House Team

Hiring an External Contractor for a Specific Learning Objective

Hiring a training vendor or consultant for a specific project or limited time frame should be regarded a short-term solution. Investing in external vendors to host learning events, provide content, or provide consulting services at various times of year can be an efficient solution when you have a need for outside expertise on a specific topic and a short-term milestone you'd like to achieve. Be sure to research multiple vendors for the sake of cost-comparison, and above all be certain about the learning outcome and business impact you hope to achieve, so you can properly select the vendor that can help drive those specific results.

“According to the Association for Talent Development, organizations spent $1,273 per employee in 2016 on direct learning expenditure.”

Staffing a Full-Time Learning & Development Team

There are benefits to building an in-house L&D team over hiring a short-term contractor. In addition to being able to maintain longer term or more extensive programs that can grow and evolve with business needs, in-house teams are better positioned to evaluate a program’s long-term effectiveness, make changes, and improve value.

The first step to building an in-house Learning & Development team is to determine where the team should sit in your organization. Funding, strategic priorities, and access to resources are all determined by the department into which the L&D function reports. Once you’ve determined where L&D fits into your company, you can shift your focus to budget, team tasks and hiring personnel.

You can also use in-house teams and external vendors in combination. For example, an in-house Learning & Development team tasked with managing training initiatives company-wide may build the majority of programming in house but hire external experts to facilitate specific training sessions or consult on specific programs.

Deciding on Learning Team Roles & Responsibilities

Learning team responsibilities typically include program management, analysis, design and execution. The team defines the learning strategy, creates and implements training and tracks training completion and success. Individual skills within the team may include program or project management, instructional design, and training content development.

It is especially important to decide what role the L&D team plays in content development. Will they manage programs but outsource content production? Or rely on volunteers from other teams to create content? If you want the L&D team to be the primary creators of learning content, you should consider the subject matter expertise required to validate that content, the creative skills required to produce that content, and the time and energy it can take to build content.

To be effective, launching a learning team with at least 2-3 employees can make a big difference in the kinds of programming that team can produce. The team lead should work with senior leadership to set the L&D strategy, mission and broader curriculum. Mid-level learning staff should be involved in vetting potential training partners, tools and vendors, as well as developing content and/or critically examining content developed by consultants or subject matter experts on other teams. Junior level staff should support the entire L&D practice by coordinating logistics for training sessions, handling scheduling, web conference setup, room reservations, catering, and other event planning and administrative items necessary to ensure a smooth learning experience. Junior staff may also participate in developing content, in particular handle recording and editing video of learning sessions, in addition to handling day to day administrative tasks in learning management systems.

Hiring L&D Personnel

When hiring Learning & Development staff, the skills and experience required can range from program management, to industrial-organizational (I-O) psychology qualifications, to industry-specific subject matter expertise, to technical or artistic / multimedia skills required to create learning content. Highly adaptable team members are needed.

Some soft skills and qualities that are helpful and important for learning staff include:

- Flexibility (working with various departments, leaders, vendors and time zones)
- Organization (and attention to detail)
- Communication (verbal, written and interpersonal)
- Management (of staff, learners and projects)
- Staying Current (open to learning new tools, keeping up with the latest teaching methods)

You may also want to consider the following skills if you plan to have your internal team develop a great share of the curriculum:

- Training in or understanding of instructional design
- Familiarity with eLearning authoring tools & standards such as SCORM or xAPI/TinCan
- Familiarity with video recording and editing
- Familiarity with content databases or learning management systems

During the interview process, you'll want to consider both external candidates and internal "learning champions" for the positions you hope to fill:

External L&D Specialist Recruits: External recruits can bring new vendor relationships or skills, as well as fresh perspectives, to the table. You are also more likely to find people who have specialized experience with e-learning, instructional design, creating content, or developing soft skill programs. Once they are hired, make sure to uplevel their understanding of the business so they are able to build meaningful programs for your organization.

Hiring Internal "Learning Champions": Sometimes the best Learning & Development team members do not come from a traditional L&D background. Identify who your "learning champions" are in your organization, as these employees are evangelists for learning and show an interest in helping or being involved in learning programs. These individuals are already familiar with company culture, organization structure, and how the business operates. They understand your business and can relate to the day-to-day responsibilities of the learners. They might be open to a role change or could be a great subject matter resource for the Learning & Development team.To elevate them beyond just an SME role, have them supplement their current skills by attending courses, reading books, or becoming an active part of the Learning & Development community.

Conclusion

Media, marketing and advertising technology organizations face unique learning and development challenges. Shifting industry trends, the increasing reliance on technology to conduct business, and the rapid pace of technical innovation can all lead to poor knowledge retention, higher employee turnover, compromised team leadership, and loss of revenue; unless effectively addressed by training and educational programs.

These challenges can be overcome through intelligent investment in a Learning & Development function, dedicated to providing training and career advancement solutions. Whether hiring a single person to lead all training and educational activities on behalf of a small-size firm, or investing in the creation of a comprehensive team to address education needs for a larger organization; allocating specific budget and headcount to Learning & Development can make an enormous difference, allowing companies to tap into a broader range of employee and revenue potential.

Helpful Links

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For information on other industry Learning & Development Programs approved for IAB Certification Credit see iab.com/recertification/#partners