

# Learning Organization Self-Assessment

## Future Learning Organization Self-Assessment Tool

**How to use this tool:** This tool is designed to help learning leaders assess the current state of their organization against an ideal future state. The ideal future state is defined by seven characteristics each represented as a category in Column A. For each category, there is a continuum of performance from low (Column B) to high (Column F). Read the questions posed beneath the categories listed in Column A, then select the level of performance (I in Columns B-F) that best represents your organization's current capabilities. When you have done this for all seven categories, you have defined your current state. Next, select the levels that realistically represent your desired state. We will discuss "how to get from current to desired states during the workshop."

SELF-ASSESSMENT CATEGORIES	SELF-ASSESSMENT LEVELS				
	LOW - "Behind the Times"		MED - "Up To Date"		HIGH - "Leading Edge"
<b>1. LEARNING LEADER EVOLUTION</b>	Overwhelmed	"Fire Chief"	Manager	Business Partner	Strategic Leader
<i>As the leader of the learning function, how would you assess your own capabilities?</i>	Drinking from the fire hose. May be a new leader with minimal training experience or expertise at the leader level. Not productive	Putting out fires. Reactive vs. proactive in managing the work.	Everything is running effectively and the business is supported.	Collaborates effectively with customer and stakeholders to go beyond simply "running the business." Articulates what is needed for organization's success. Influences peers and senior stakeholders to secure resources and facilitates positive change.	Visionary--evaluates the long-term horizon and understands emerging needs. Catalyst for positive change. Capable of consulting to impact organizational performance. Influences and or helps shape culture of organization.
<b>2. TRAINER EVOLUTION</b>	Novice	"Order Taker"	Manager	Learning Consultant	Performance Consultant
<i>Do your trainers interface with customers effectively and build curricula that drives business outcomes?</i>	Drinking from the fire hose. May be a new trainer with no experience in the onboarding phase. Not productive	Executes the work. May say 'yes' to everything.	Collaborates with stakeholders.	Skilled at consulting on all things in the learning space.	Strong influencer. Skilled at consulting beyond the learning space to advise on broader performance needs. (Promote this person!)
<b>3. RESOURCE ALLOCATION</b>	Ad-hoc	"Keeping the Lights On"	Running the Business	Aligned with Priorities	Aligned with Impact
<i>How effectively do you allocate your resources--people, time, tools, and budget?</i>	Function is overworked and under serving due to lack of, or misaligned resources.	Running the business, but no curriculum or format improvements.	Consistently investing in curriculum and format improvements.	Resources aligned with an eye toward the future (1-2 yr. plan) with some trade offs.	Strategic allocation with reassessment over time to drive business impact (1-5 yr. plan).
<b>4. CONTENT STRATEGY AND STANDARDS</b>					
<i>How well is your content aligned with business needs? And, are you deploying it in a manner that optimizes learning? Do you have standards in place to ensure quality?</i>					
<b>4.a. Instructional Design*</b>	Spotty Use	Hit or Miss	Effective Approach	"In the Groove"	ID PhD
<i>Are you consistently applying ID principles to produce learning that impacts business results? *Assumes that a competency or behavioral model is in place.</i>	Spotty use of ID principles. Variable (if any) alignment between needs and training outcomes.	Inconsistent use of ID principles. Some alignment of needs and training outcomes.	Consistent use of ID principles. Basic alignment with business needs, producing positive outcomes. Quality standards established but not used consistently.	Consistently applying ID principles, leading to positive training outcomes. Quality standards employed consistently.	Engrained ID philosophy and high-quality standards applied to produce well defined and clearly observable business outcomes.
<b>4.b. Deployment technology</b>	"Bare Bones"	LMS "Lite"	Standard Package	Well-Equipped	Innovation Seeker
<i>Is your learning technology behind the times? Are you choosing the right systems and tools to deliver courses and content?</i>	Server-based deployment.	LMS with basic functionality.	LMS, web-conference, and content management system (formal or informal).	Mobile-friendly LMS (access anywhere), formal CMS, and virtual classrooms.	Organization "keeps an eye" on emerging technologies that can transform the learning space.
<b>4.c. Format</b>	Homogenous	Some Options	"Right Tool for the Right Job"	Ideal and Engaging	Cutting Edge
<i>Are you choosing the best format (e.g., print, digital, live) for each category of learning?</i>	One or two formats used for all assets regardless of content category or effectiveness (e.g., all video, all ecourse)	Using a mix of formats but not always in an effective manner.	Utilize ideal format for each category of learning deliverable or desired outcome.	Spectrum of formats leveraged. Learners challenged and motivated to learn and achieve desired outcomes.	Plus: Goes beyond. Experiments with new techniques and formats to engage learners and enrich and or accelerate learning.
<b>4.d. Modern Learner Focus</b>	"No Clue"	Boring but Better	Relevant and Active	Access Everywhere	Empowered Learner
<i>Is your organization addressing the needs of the modern learner? Modern learners have short attention spans and are easily distracted. They are highly visual and process data extremely fast. They use multiple devices for learning and move between devices seamlessly. Many are accustomed to direct rewards for their performance.</i>	Learning content is long in duration, not interactive, not compelling, and not relevant.	Creating smaller "chunks" of learning that are more visual. Minimally interactive. Some relevance.	Plus: Highly interactive, more compelling.	Plus: Access on device of choice.	Plus: Learner enablement (Giving the learner more control--self-paced, learner-driven.)
<b>5. PERFORMANCE SUPPORT</b>	Nonexistent	Random	Adopted	Regular Use	Driving Retention
<i>Are you providing the means for employees to learn, reinforce learning, or improve performance while on the job?</i>	Not implemented.	Ad-hoc implementation for some topic areas.	Deployed for priority business topics.	Deployed and measured.	Purposeful deployment with analytics leveraged for program and performance improvement.

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6. MEASUREMENT STRATEGY	"Smile Sheet Sadness"	The Basics	Industry Standard	Ahead of the Pack	Measurement Master
<p><i>How effectively are you evaluating your organization's performance? Are you assessing assets and programs, analyzing their effectiveness and "actioning" for improvement?</i></p>	<p>Level 1- Limited value.</p>	<p>Levels 1 and 2 implemented consistently to ensure compliance. Results used to make small tweaks to programs.</p>	<p>L1-3 implemented consistently to assess program effectiveness and learner performance. Results used to make incremental program improvements.</p>	<p>L1-3 standard. L4 used in targeted manner. Results may inform targeted changes to individual program components or could trigger wholesale program curriculum redesign.</p>	<p>Apply findings from L1-4 to feed continuous improvement initiatives, inform resources allocation, and develop talent.</p>
7. DISTRIBUTION RATE	Dysfunctional	"Snail's Pace"	Status-quo	Collaborative	Game Changing
<p><i>How fast can you deliver new content? (This could be a game changer)</i></p>	<p>Reactive, slow, sometimes toxic. At mercy of M-L-R.</p>	<p>Mostly slow, some work accelerated based on senior leadership intervention</p>	<p>Transactional. Standard partnership with M-L-R-parties. Collaborate to resolve differences.</p>	<p>Collaborative partnership. Forecast training jobs on annual rolling basis to minimize surprises. Utilize some concept reviews.</p>	<p>Strategic partnership with M-L-R. Maximum dissemination rate.</p>