



Learning with IMPACT Toolkit

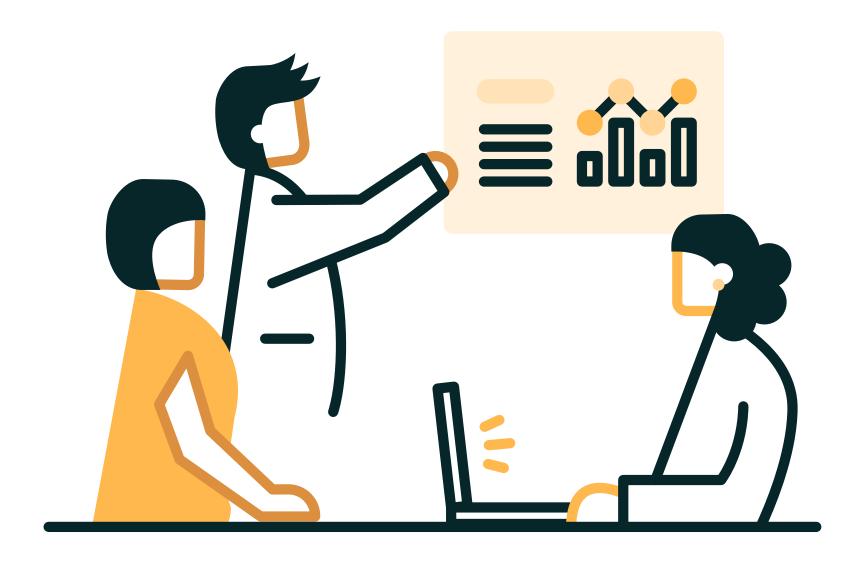
Your action plan to better learning and performance outcomes

Introduction

This toolkit is a guide to help you ensure that you are designing for **impact** and **outcomes**. It offers key tips and tricks so your learning will have kick and contribute to the bottom line of your organisation - enabling outcomes for your people and your business. We recommend that you use this toolkit at the start of any large initiative.

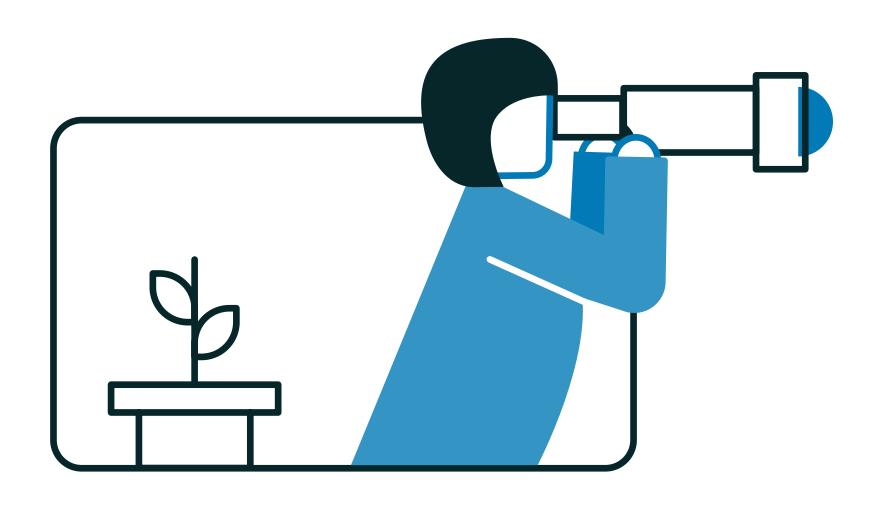
The toolkit is split into eleven sections. Each section includes some context and guidance, and a quick exercise for you to complete.

To demonstrate how the toolkit works, we have included a worked example using a fictional scenario alongside each section.





1.
Know your KPIs
(Key Performance
Indicators)



Know your KPIs

(Key Performance Indicators)

To measure impact, you need to know the goals of your company. These are not learning metrics, but rather, how the business operates. Your interventions and investments should always directly align with these KPIs.

Some places you can find this information are:

- Shareholder prospectus
- Onboarding materials
- Customer-facing website
- Town hall meetings
- Project Management Office (PMO)

Worked example intro

You work for a grocery retail company. The business has decided to introduce a new point of sale (POS) system to modernise the store experience and reduce wait times which have been highlighted in negative customer feedback. All store staff will be expected to use the tool.



Worked example



a) How does my business make money?

Through sales of new products. KPIs include:

- Sales figures
- Customer satisfaction scores
- % of new and returning customers



b) How does my business save money?

Theft management, reducing cost of materials, improved product sourcing, optimising shopping experience (reduced waiting times at checkout), stock management (matching stock levels to demand, timely reordering). KPIs might include:

- Value of losses due to theft
- Cost of materials over time
- Waiting times
- % of out of stock items

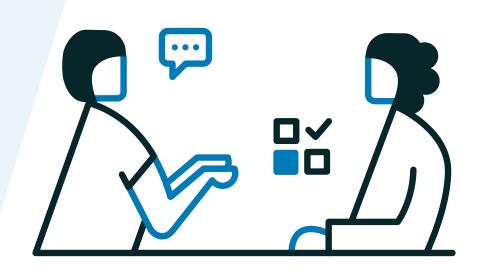


c) How does my business mitigate risk?

Environmental impact assessment, ethical sourcing, theft management, customer data protection procedures.
KPIs might include:

- Results of an ESG assessment
- Value of losses due to theft
- Compliance with data protection procedures assessed through data protection audit

After doing your research, you should now be ready to answer the following questions:



Use this interactive PDF to answer the questions



a) How does my business make money?



b) How does my business save money?



c) How does my business mitigate risk?



2. Evidence of need

Evidence of need

As detailed in section one, it is critical that learning investments align with how the business operates and succeeds. Too often, loud stakeholders influence the roadmap with their own opinions. Instead, it is critical to think about learning like any other part of the business. This is why the next step whenever you consider building or buying learning is identifying evidence of need.



To do so, you will need to look into the business. Below are some metrics you might wish to consider (but there are many more):

- Are there certain roles that are hard to fill (check your internal job boards)? This may indicate a shortage in a particular skill.
- What are people searching for on your intranet/LMS? These may be early indicators of content or skills gaps your people are trying to fill.
- Are there low satisfaction scores in your employee surveys which could indicate frustration with current learning opportunities?

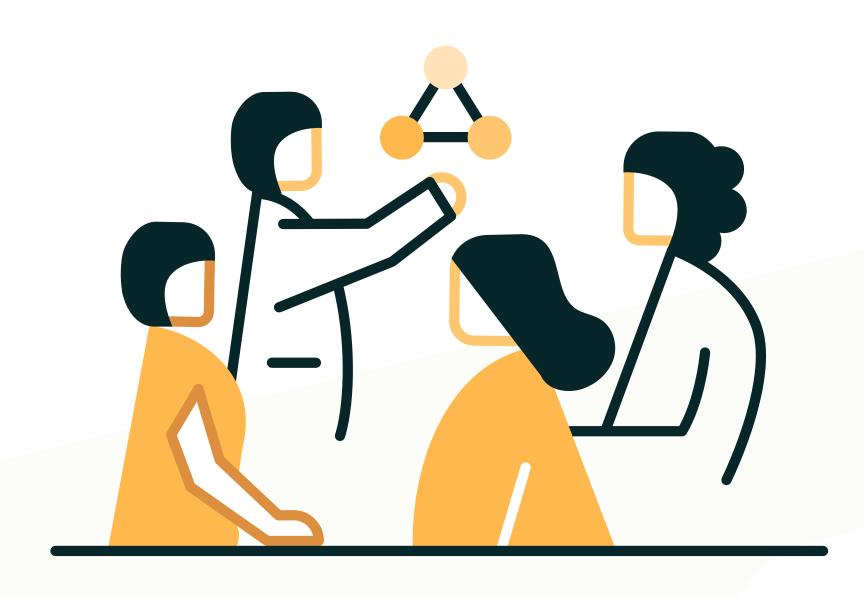
- If you use project management software, take a look at metrics such as budget management and the percentage of projects delivered on time. Does this highlight any areas for improvement?
- Are there trends in skills gaps identified in performance reviews?
- Look at your customer satisfaction metrics. How is your company performing against customer expectations? Where are the lowest scores and what skill gaps do they suggest?



Worked example

Evidence 1

New POS system has been selected by the business with the hope that it will reduce wait times in store. No current staff have expert knowledge of the system. All shop floor staff need to use this tool successfully within one month of rollout.







Use this interactive PDF to answer the questions



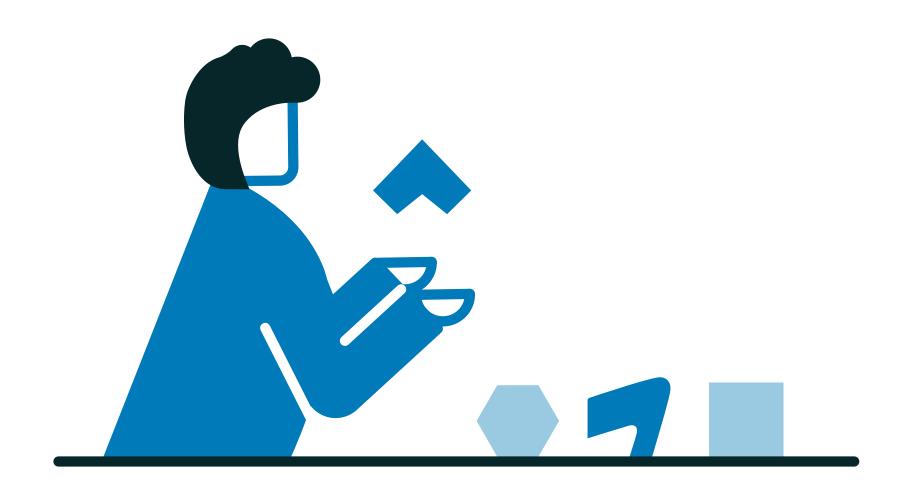
Once you have completed your research, identify one or more pieces of evidence of need for your project:

Evidence 1

Evidence 2



Is this problem best solved by learning?



Is this problem best solved by learning?

Evidence of need identifies there is a performance gap, however, this may or may not be solved by learning. For example, it might be a simple internal communications problem or a lack of tools. It is critical to use performance consulting to get to the root of any issue.

Consider the following:

- a) Do employees have the right conditions to meet the performance gap (time, tools, support, incentive)?
- b) Is this performance gap best addressed with internal communications?



Worked example

a) Do employees have the right conditions to meet the performance gap (time, tools, support, incentive)?

With training, yes. Employees will have time scheduled, support from floor walkers and line managers. Using the tool will be a key part of their role.

b) Is this performance gap best addressed with internal communications?

Internal communications will be an element of this change project, but training will also be a key part due to the need to acquire new skills in how to use the system.





Use this interactive PDF to answer the questions



Your turn

a) Do employees have the right conditions to meet the performance gap (time, tools, support, incentive)? b) Is this performance gap best addressed with internal communications?



4. Prioritisation

Prioritisation

The truth is that there are always limited resources and budgets for any organisation. Whilst it would be ideal to be able to address all learning needs, there will inevitably come a time when decisions have to be made. The following questions can assist with this process:

- a) If this learning meets the expected outcomes, will it have more or less business impact than other planned projects?
- b) Does this project align with the skills strategy at your organisation? (This is critical as it informs the overall goals of the business.)

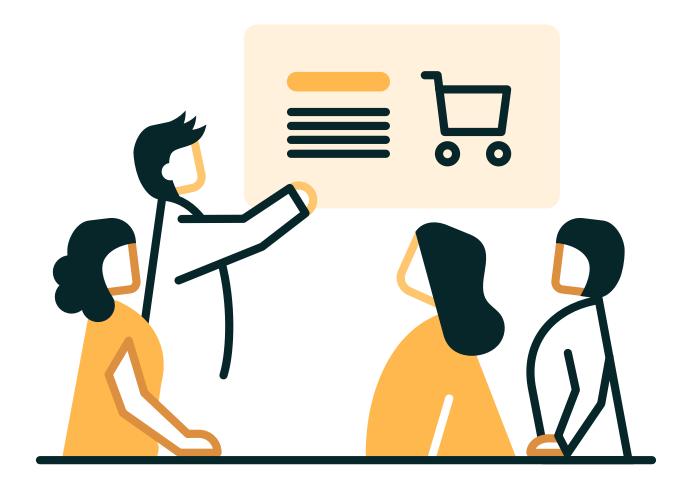
Worked example

a) If this learning meets the expected outcomes, will it have more or less business impact than other planned projects?

More - this is a business-critical tool that all shop staff will need to be able to use to perform their role. This must take priority over other planned initiatives.

b) Does this project align with the skills strategy at your organisation? (This is critical as it informs the overall goals of the business.)

Yes - this is a core skill for all shop floor staff. It needs to be rolled out to existing staff but will become a core skill for new recruits into those roles.





Your turn

a) If this learning meets the expected outcomes, will it have more or less business impact than other planned projects?

b) Does this project align with the skills strategy at your organisation? (This is critical as it informs the overall goals of the business.)



Use this interactive PDF to answer the questions





5. Always be measuring

Always be measuring

Measuring well and often should be critical to any learning intervention, but it can be difficult to know where to begin. Luckily, when you identify the evidence of need you have the key to start a measurement strategy. The next steps are to complete the following:

a) For each evidence of need, what is the target to improve? For example, do you want to reduce errors by 20%?



b) My plan for measuring the impact:

- Who will be responsible for collecting the data?
- Who will be accountable for assessing the data?
- How often will the data be measured?
- If the target to improve is not reached, who is responsible?

Worked example

a) My target for evidence 1 is:

- In-store waiting times reduced by 20% within two months of rollout
- Less than 20 errors per store per week, reducing to 10 errors after 3 months
- Stock levels remaining at 85% of higher

b) My plan

- Who will be responsible for collecting the data?
 Store waiting times are automatically monitored and reported at the shop, region and national level
- Who will be accountable for assessing the data?
 Store experience team
- How often will the data be measured?
 Monthly
- If the target to improve is not reached, who is responsible?
 District managers



a) For each evidence of need, what is the target to improve? For example, do you want to reduce errors by 20%?

- My target for evidence 1 is:

- My target for evidence 2 is:

b) My plan for measuring the impact:

- Who will be responsible for collecting the data?
- Who will be accountable for assessing the data?
- How often will the data be measured?
- If the target to improve is not reached, who is responsible?

Use this interactive PDF to answer the questions





6. The complete learning experience

The complete learning experience

Learning often takes place in the form of a course, but there are so many other factors to ensure that practice and feedback augment the experience and make the learning stick. Consider the following when building a complete learning experience.

Coaching and feedback

- a) Who is responsible for coaching the employee in this learning experience?
- b) How will the coach know they are responsible for providing feedback?
- c) How often will the employee need to be <u>coached?</u>
- d) Is there a rubric for how the coach should give feedback?
- e) Who is responsible for ensuring that the coach has the capacity and time for feedback?

Practice and application

- a) Are there opportunities for the employee to practise the skills from the learning in a safe environment?
- b) Is the employee given ample time to practise and apply the skills?
- c) How will the employee know when and how they should practise the skills?

Worked example

Coaching and feedback

a) Who is responsible for coaching the employee in this learning experience?

At rollout, early-adopter floor walkers will be available.
Later, duty managers and store managers with oversight from the district manager will be responsible.

b) How will the coach know they are responsible for providing feedback?

Included in internal comms about the change. Early adopter stores will volunteer and understand that their staff will be needed to coach in other locations on launch days.

c) How often will the employee need to be coached?

Estimated for first 10 interactions.

d) Is there a rubric for how the coach should give feedback?

Yes, early adopters will help design this.

e) Who is responsible for ensuring that the coach has the capacity and time for feedback?

District managers - additional staff will be scheduled on launch weeks.

Worked example

Practice and application

a) Are there opportunities for the employee to practise the skills from the learning in a safe environment?

Yes - a sandbox site will be provided alongside guided simulations.

b) Is the employee given ample time to practise and apply the skills?

Store staff will be scheduled to attend in-person training within their usual work environment.

c) How will the employee know when and how they should practise the skills?

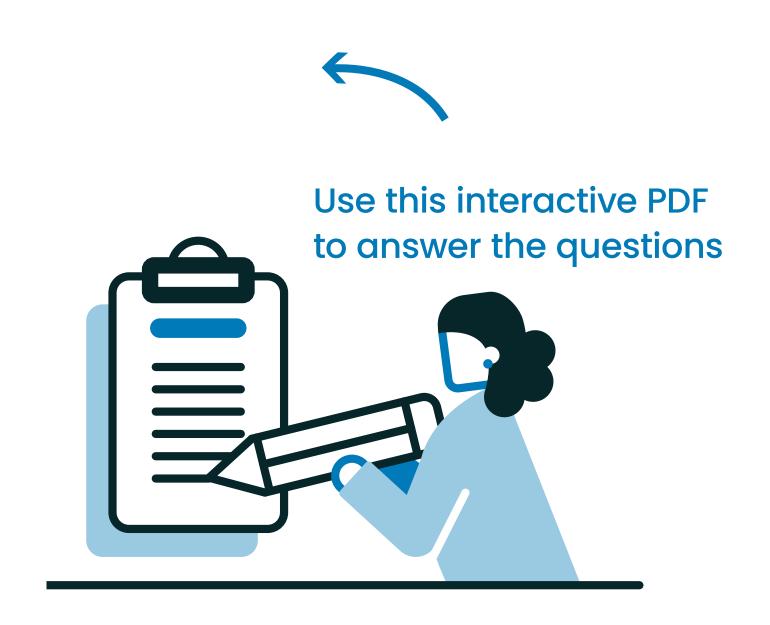
Guidance will be given as part of initial comms and the in-person training event. They will continue to be coached in the store as above.

Coaching and feedback

- a) Who is responsible for coaching the employee in this learning experience?
- b) How will the coach know they are responsible for providing feedback?
- c) How often will the employee need to be coached?
- d) Is there a rubric for how the coach should give feedback?
- e) Who is responsible for ensuring that the coach has the capacity and time for feedback?

Practice and application

- a) Are there opportunities for the employee to practise the skills from the learning in a safe environment?
- b) Is the employee given ample time to practise and apply the skills?
- c) How will the employee know when and how they should practise the skills?





7. The voice of the learner

The voice of the learner

The common complaint is that people do not have time to complete learning. You must take this seriously, as it can easily become a barrier to learning adoption. This is why it is critical to consider the following

- a) How many hours of mandatory learning are required per year?
- b) How many hours of learning are allocated per employee per year?
- c) Are there other learning initiatives planned at the same time for the same audience?
- d) Could this learning be best delivered by internal communications?
- e) Are there language requirements?
- f) What is a common profile of a target employee?



Worked example

a) How many hours of mandatory learning are required per year?

15 hours mandatory learning per year.

b) How many hours of learning are allocated per employee per year?

30 (1 day each quarter).

c) Are there other learning initiatives planned at the same time for the same audience?

No.

d) Could this learning be best delivered by internal communications?

No - but internal comms will play a part in the wider rollout.

e) Are there language requirements?

No - the system will only be used in English-speaking countries.

f) What is a common profile of a target employee?

Role: Sales assistant

Age: 21

Salary: Entry-level

Work priorities: Keeping the store tidy, delighting customers.

Work challenges: Busy periods, especially at weekends. High turnover of staff means they are often working with someone new.

Personal priorities: Time to enjoy their hobbies and spend time with friends. Socially conscious.

Digital skills: Digital native, high usage of social media and online games

After doing your research, you should now be ready to answer the following questions:

- a) How many hours of mandatory learning are required per year?
- b) How many hours of learning are allocated per employee per year?
- c) Are there other learning initiatives planned at the same time for the same audience?
- d) Could this learning be best delivered by internal communications?
- e) Are there language requirements?
- f) What is a common profile of a target employee?



8. Environment

Environment

Technology and location both play important roles in learning design. These should be evaluated at the start of any learning development to ensure success. Consider the following:

- a) What is the environment of the employee? (i.e. factory, office, remote)
- b) What devices does the employee primarily use? (i.e. mobile, laptop)
- c) Do they have a quiet and secure location to access the learning?



- d) Are there any accessibility requirements?
- e) Do employees pay for their own data plans?
- e) What is your strategy to address the environment?



Worked example

a) What is the environment of the employee? (i.e. factory, office, remote)

Shop floor, shop back office.

b) What devices does the employee primarily use? (i.e. mobile, laptop)

Personal mobile, store desktop computer.

c) Do they have a quiet and secure location to access the learning?

Not in their usual work location.

d) Are there any accessibility requirements?

Need to consider staff with dyslexia and colour blindness.

e) Do employees pay for their own data plans?

Yes.



f) What is your strategy to address the environment?

Offer training in store, then provide additional training available via tablets in store (time will be included in rota planning) and on-the-job coaching. In-built performance support within the new system to provide contextual support.

After doing your research, you should now be ready to answer the following questions:

- a) What is the environment of the employee?
- b) What devices does the employee primarily use?
- c) Do they have a quiet and secure location to access the learning?
- d) Are there any accessibility requirements?
- e) Do employees pay for their own data plans?
- f) What is your strategy to address the environment?

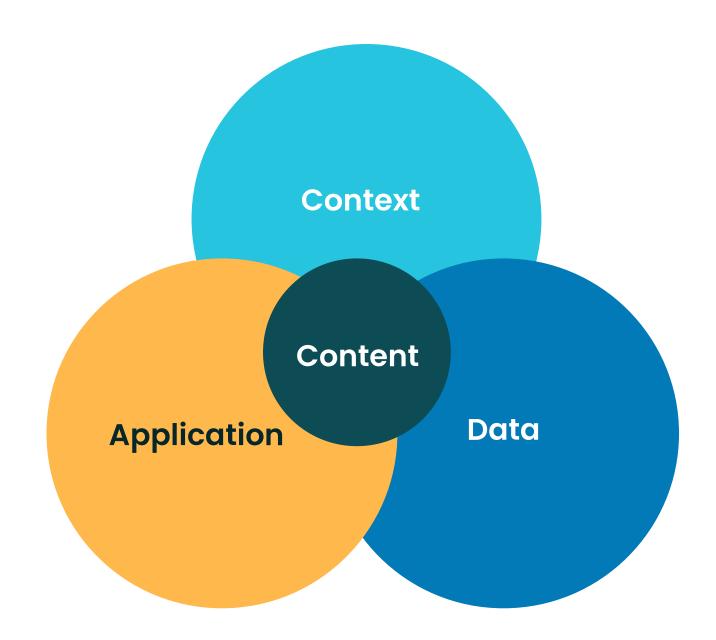


9. Context

Context

Learning at the point of need means it will be applied and reinforced. This is why it is important to plan where and how learning will be deployed. When considering context, you might include:

- The starting point what level of skill/ knowledge do your learners already have?
- The working environment does it support the skills and behaviours you are asking learners to perform?
- Time and attention what other priorities or time commitments could impact the learner's ability to focus on this?
- Where learning takes place is this learning that should take place outside of their day-to-day work, or is it better embedded within the flow of work, on the job or as performance support?



Ask yourself these questions when you've thought about the context of your learning:

- a) In which context should the learning appear?
- b) Where and how will the learning be applied?
- c) What data will be used to establish the context??



a) In which context should the learning appear?

Initial training will be given in their usual store to embed learning directly. Simulated system environments will be available via store tablets. Further coaching will be given as the system is rolled out.

b) Where and how will the learning be applied?

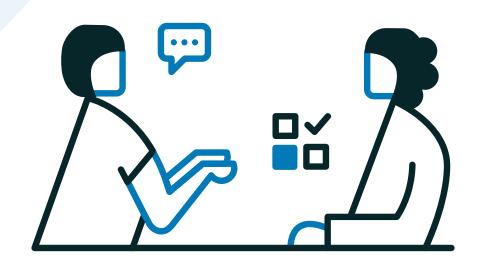
On the shop floor, daily.

To start with, additional staff will be rostered to support and account for practice on the job.

c) What data will be used to establish the context?

Success of previous simulated training programs on KPIs.

Ask yourself these questions when you've thought about the context of your learning:



Use this interactive PDF to answer the questions



a) In which context should the learning appear?

b) Where and how will the learning be applied?

c) What data will be used to establish the context?

10.
Proactive
stakeholder
management

Proactive stakeholder management

When you start to use data to implement complete learning experiences, you will need a stakeholder strategy. Stakeholders each have their own goals and priorities, which may or may not align with yours. Stakeholders might include colleagues from IT, leadership, HR, managers and team leads, subject matter experts, and more. Consider:

- a) Which stakeholders are allies?
- b) Which stakeholders are detractors?
- c) Is there one very senior stakeholder who can be an ambassador and support you when you decline a learning request due to a lack of evidence (note: they should be outside of L&D)



d) What is your strategy to manage stakeholders for this project?

- Who will engage the stakeholders?
- Who will communicate with the stakeholders?
- Do you have a responsibility matrix for the project? Consider setting up a RACI (responsible, accountable, consulted and informed) matrix. Ensure that it is circulated and agreed in advance.

Worked example

a) Which stakeholders are allies?

Head of Retail, Head of Finance.

b) Which stakeholders are detractors?

None identified.

c) Is there one very senior stakeholder who can be an ambassador and support you when you decline a learning request due to a lack of evidence (note: they should be outside of L&D)

Chief People Officer.

d) Strategy

- Who will engage the stakeholders?
 Head of L&D presenting initially at leadership team meeting. Once agreement in place, reverts to me as project lead for regular stakeholder comms.
- Who will communicate with the stakeholders?
 Open project plan for stakeholders interested in the detail.
 Scheduled meetings with team leads affected. Weekly status reports and monthly update in all hands meeting.
- Do you have a responsibility matrix for the project? Consider setting up a RACI (responsible, accountable, consulted and informed) matrix. Ensure that it is circulated and agreed in advance.

Yes, RACI has been established. Briefly:

- Responsible: Me
- Accountable: Head of L&D
- Consulted: Head of Finance, Chief People Officer, retail staff council reps, store managers
- Informed: All staff

After doing your research, you should now be ready to answer the following questions:

- a) Which stakeholders are allies?
- b) Which stakeholders are detractors?
- c) Is there one very senior stakeholder who can be an ambassador and support you when you decline a learning request due to a lack of evidence (note: they should be outside of L&D)
- d) What is your strategy to manage stakeholders for this project?
- Who will engage the stakeholders?
- Who will communicate with the stakeholders?
- Do you have a responsibility matrix for the project? Consider setting up a RACI (responsible, accountable, consulted and informed) matrix. Ensure that it is circulated and agreed in advance.

11. Brutally efficient design



Brutally efficient design

There are some practical ways that you can ensure your learning has the most impact. Be ruthlessly focused on what content is included, and how that content is presented. Every decision should be made with learning outcomes in mind. Remember that when it comes to effective transfer of knowledge and skills, less is definitely more.

The following list has some guidelines for keeping your learning effective and potent:

- Does the learning stay on topic and only contain information relevant to the learning objectives?
- Is the writing effective?
 - There are metaphors, analogies, and comparisons.
 - The content follows the inverted pyramid of writing (insert link).
 - There is storytelling and authenticity.
- Is the learning designed for the medium?

- Does the learning use disproven myths such as 'learning styles'? If so, the content should be redesigned.
- Does the learning rely on gimmicks such as gratuitous interactivity? If so, these should be reconsidered.
- Does the content speak to adults as adults? Remember, your audience is made up of your colleagues.

Learning with impact must be streamlined and as efficient as possible.

For more details on efficient design, refer to the **Learner Social Contract.**



Worked example

a) Does the learning stay on topic and only contain information relevant to the learning objectives?

Yes, all learning content has been mapped to the learning objectives.

b) Is the writing effective?

Content has been reviewed against all of these points and refined.

c) Is the learning designed for the medium?

Digital content is short, targeted, and optimised for delivery via tablet devices as the main delivery channel. Managers have been given talking points, stories and example scenarios to work through in coaching sessions.

d) Does the learning use disproven myths such as 'learning styles'? If so, the content should be redesigned.

No.

e) Does the learning rely on gimmicks such as gratuitous interactivity? If so, these should be reconsidered.

No.

f) Does the content speak to adults as adults? Remember, your audience is made up of your colleagues.

Yes – we have had the content proofread against our internal style guide which includes this checkpoint.

After doing your research, you should now be ready to answer the following questions:

a) Does the learning stay on topic and only contain information relevant to the learning objectives?

b) Is the writing effective?

- There are metaphors, analogies, and comparisons.
- The content follows the inverted pyramid of writing
- There is storytelling and authenticity.
- c) Is the learning designed for the medium?

- d) Does the learning use disproven myths such as 'learning styles'? If so, the content should be redesigned.
- e) Does the learning rely on gimmicks such as gratuitous interactivity? If so, these should be reconsidered.
- f) Does the content speak to adults as adults? Remember, your audience is made up of your colleagues.

We hope that this toolkit becomes your practical guide to developing and delivering learning for impact and outcomes. As you know, crafting impactful learning experiences goes beyond creating engaging content; it requires a comprehensive approach to guarantee tangible results.

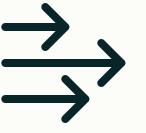
Achieving a return on investment (ROI) for your business, and genuine impacts for your people, involves more than just the learning experience itself. It's only when we're taking a complete view of our learning projects that we deliver true impact.

Next time you're planning a new learning initiative, remember these points:



1. Know your KPIs

You can't measure impact until you know where that impact is needed. Understanding how your business makes money, saves money and mitigates risk should focus your time and effort where it is needed most.



Next time you're planning a new learning initiative, remember these points:







2. Evidence of need 3. Is this problem best 4. Prioritisation

It is critical that learning investments align with how the business operates and succeeds. Where are your efforts needed most to support this? What skills gaps exist that would impact your organisation's KPIs?

solved by learning?

Take a pause. The needs you have identified may not be best solved by training (or training alone). Assess whether there are environmental, tooling or communication conditions that affect people's ability to perform. Only when those are in place is learning likely to be effective.

You're unlikely to have unlimited time and budget for learning. So it's important to focus it where it is needed most. What will have the biggest impact on your KPIs?



5. Always be measuring

How will you know your learning has had impact if you don't measure it? Measurement doesn't come at the end of a project - it must be planned at the start, baseline measures identified and success criteria agreed.



6. The complete learning experience

Learning doesn't necessarily mean rolling out a course. Consider the full learning experience to be successful. What coaching and feedback will be provided? What opportunities will people get to practise their new skills? What performance support can you put in place?

Next time you're planning a new learning initiative, remember these points:







7. Listen to the voice of the learner

In our busy working days, fitting in learning can feel difficult. You won't motivate people to learn by overwhelming them with mandatory training requirements. Use their valuable learning hours wisely – where it has the greatest impact.

8. Enviroment

Think about the learner's environment - where are they, and what tools do they have available to them when completing their learning? Design with this in mind.

9. Context

Plan where and how learning will take place.
Learning at the point of need means it is more likely to be applied and reinforced through practice.



10. Proactive stakeholder management

Your project doesn't exist in isolation. You'll need to work with stakeholders across your organisation (and maybe outside it), who each have their own goals and priorities. Identify who your stakeholders are, and what you need from them. (Tip: If you can clearly tie your learning to business outcomes, you're more likely to win them over.)



11. Brutally efficient design

Be ruthlessly focused on what content you include, with every decision focused on learning outcomes. Less is often more.





If you'd like to connect with others focused on this, why not join the Totara Community? The Community is your one-stop shop for learning and resources about Totara products and talent experience in the workplace. It's a vibrant community of people who connect and learn from others, with comprehensive and inspiring content in a highly supportive environment. It's the meeting place for people like you, passionate about best-practice learning and development.



Lori Niles-Hofmann
Senior Learning Strategist and
Co-Founder of NilesNolen



Lars HylandChief Learning Officer
at Totara



Rachel Griffith-Boyes
Head of Community Services
at Totara



Matt Linaker
Partner Onboarding and
Enablement Lead at Totara





Not yet a Totara customer? Request a personalised demo from a Totara expert to help you determine what solution(s) would be the best fit for your organisation.

Book a demo

Already a Totara Customer and want to know more about how you can be more outcomes oriented using the full capabilities of your Totara platform? Then get in touch with us through the Community or your Totara Partner so we can help you get started.

Talk to us

www.totara.com

United States

San Francisco, California +1 888 234 0222 info@totaralearning.com

United Kingdom

Brighton +44 (0)1273 964014

New Zealand

Wellington +64 (0)4 385 839