

## **LEARNING & DEVELOPMENT PLAN TEMPLATES**

The following templates provide HR Professionals and / or Line Managers with a series of simple and logical steps for creating an effective learning & development plan

The four templates have been designed by Frank Penson, Senior Partner of Strategies for Training, a specialist consultancy which helps organisations to design and implement effective training, learning and development strategies. The templates have been developed and refined in the light of “road-testing” with blue-chip organisations and consultation with highly experienced HR professionals.

Please see page 2 for detailed Guidance Notes. The remaining four pages are the templates themselves. These templates may be used by individuals and organisations providing that the copyright continues to be acknowledged.

# LEARNING & DEVELOPMENT PLAN TEMPLATES

## GUIDANCE NOTES

These notes explain how to use the templates. In each of the templates is a partial example, simply to illustrate how it works. Each of the four templates may be used initially to create a draft and then subsequently to record the agreed plan. In particular, the second template should be completed in draft before a final version is attempted.

### **First template: What must be the focus of our learning and development activity?**

In the first column of this template, list the business outcomes required. What is it that your organisation needs to achieve? This question must be answered in terms of outcomes: the more specific the better. These “outcome” statements should reflect your organisation’s objectives, critical success factors and / or benefits which your organisation is seeking. If your organisation’s objectives are already expressed as outcomes, then they can be slotted straight into this column.

In the second column, record the learning & development outcomes which you believe are required in order to generate the business outcomes. There should be one description for each business outcome requirement. These statements should answer the question “what do our people need to do better or differently in order to deliver that business outcome?” In organisations with capability or competency frameworks, these statements might reflect required levels of competence. In writing these outcome statements, be specific about the target “learner” population, where appropriate.

In the third column, detail how success will be measured. The evaluation measures should monitor progress versus both the learning & development and the business outcome requirements. In some cases, one measure may be able to cover both but in others there may need to be separate measures. The evaluation measures - or you may prefer the term “Key Performance Indicators” (KPIs), - should ideally be capable of demonstrating a direct link between achievement of the learning & development outcomes and achievement of the required business outcomes.

### **Second template: What then are the key elements of our Learning & Development Plan?**

Use this template in draft to decide which are the key learning & development issues, processes and activities which need to be fixed / addressed / introduced in order to deliver the outcomes required. Look to establish the optimum grouping of plan elements which, collectively, will deliver the desired results.

For each proposed plan element, enter a cross in the grid on the right against the outcomes it will deliver / help to deliver. There does not have to be a 1:1 correlation between the plan elements and the outcomes required but the intention should be that collectively the elements will generate all the desired results. Ideally, each plan element should contribute to several of the outcome requirements. Clearly, each outcome has to have at least one plan element associated with it.

The final version is then a simple way of listing the key plan elements and how they will contribute.

### **Third template: Outline Plan - One Year**

In the “Element” column, enter a simplified description of each plan element for ease of reference. Replace the “Quarter 1” etc. headings with the actual quarters. Use this template to decide and then summarise the key actions required for each element in each quarter of the coming year. Think in terms of the milestones that need to be achieved for each element. This plan needs to take account of relative priorities and available resources. There will, of course, not necessarily be an entry for every element in each quarter.

### **Fourth template: Specific Plan - Three Months**

In the “Element” column, use the same simplified description of each plan element as in the one-year template. Replace the “Quarter 1 Month 1” etc. headings with the actual months. Use this template to decide and then record in “bullet point” form a description of the detailed activities required for each element in each month of the coming quarter. This plan also needs to take account of relative priorities and available resources. The template has four bullet points per element per month but this is purely illustrative. Some elements may not have any detailed activities in some months.

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**What must be the focus of our learning and development activity?**

	<b>Business Outcomes Required</b>	<b>Learning &amp; Development Outcomes Required to deliver Business Outcomes</b>	<b>Evaluation Measures / KPIs</b>
	<b>What does the organisation need to achieve? These “outcome” statements should reflect the business objectives, critical success factors or simply benefits sought.</b>	<b>What are the learning &amp; development implications of the business outcome requirements? What do our people need to do better or differently?</b>	<b>How will we measure our progress? Evaluation measures should monitor progress versus both the learning &amp; development and the business outcomes required.</b>
<b>A</b>	<i>Example: Sales of product x increased by 20% in the next 12 months (or specify date).</i>	<i>The sales force’s “Selling Skills” average proficiency level upgraded from level 3 (standard) to level 4 (advanced).</i>	<ul style="list-style-type: none"> <li>○ <i>Average “Selling Skills” proficiency levels in 12 months’ time v now</i></li> <li>○ <i>Sales of product x in 12 months’ time v now</i></li> </ul>
<b>B</b>	<i>Example: e-business transactions to account for 30% of total business within the next 12 months (or specify date).</i>	<i>20 employees to be fast-tracked to become ABC’s e-business experts, thought-leaders and catalysts.</i>	<ul style="list-style-type: none"> <li>○ <i>The 20 to be assessed in 12 months’ time against a new e-business competency</i></li> <li>○ <i>e-business % in 12 months’ time</i></li> </ul>
<b>C</b>	<i>Example: Employees merging from organisation y (at end Q2) to be integrated and performing to ABC criteria within 12 months.</i>	<i>The 100 ‘merged’ employees to be oriented to ABC’s vision &amp; values and performance standards.</i>	<i>‘Merged’ employees to fit with normal performance distribution curve at annual performance review cycle one year after joining</i>
<b>D</b>			
<b>E</b>			
<b>F</b>			
<b>G</b>			
<b>H</b>			
<b>I</b>			
<b>J</b>			

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What then need to be the key elements of our Learning & Development Plan?

	Key Learning & Development Plan Elements	Links to Outcomes									
		A	B	C	D	E	F	G	H	I	J
1	<i>Example: Develop an enhanced Sales Effectiveness Development Programme, targeted at Representatives and Senior Representatives. Embrace e-learning as a key component of this Development Programme.</i>	X	X								
2	<i>Example: Determine selection criteria for the 20 e-business experts. Design and run dedicated assessment centres to select and then design and run dedicated development centres to develop this population.</i>		X								
3	<i>Example: Design and run a phased orientation programme for the 100 'merged' employees, covering vision &amp; values, business context, business objectives and the ABC performance management system. Optimise use of e-learning elements. Include a dedicated "Selling Skills" module for those in sales or customer facing roles.</i>	X	X	X							
4											
5											
6											
7											

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### Outline Plan - One Year

Elements		Quarter 1	Quarter 2	Quarter 3	Quarter 4
1	<i>Example: Sales Effectiveness Development Programme</i>	<i>Two-level programme specification completed. Suppliers selected.</i>	<i>Programme designed in detail. Pilots run for both Representative and Senior Representative levels.</i>	<i>Programme roll-out to all Representatives and Senior Representatives.</i>	<i>Programme evaluated and adjusted for future requirements.</i>
2	<i>Example: e-Business Expert Selection &amp; Development</i>	<i>Role profiles and assessment criteria agreed. Assessment Centre designed. Candidates identified.</i>	<i>Assessment Centres run and e-business experts selected. Development Centres designed.</i>	<i>Development Centres run.</i>	<i>Programme evaluated and adjusted for future requirements.</i>
3	<i>Example: Orientation programme for 'merged' employees</i>	<i>Orientation programme content agreed.</i>	<i>Mix of learning media determined. Initial modules (to include "Selling Skills") designed and piloted.</i>	<i>Roll-out of initial modules. Remaining modules designed and piloted.</i>	<i>Roll-out of remaining modules.</i>
4					
5					
6					
7					

## LEARNING & DEVELOPMENT PLAN TEMPLATES

### Specific Plan - Three Months

Elements		Quarter 1 Month 1	Quarter 1 Month 2	Quarter 1 Month 3
1	<i>Example: Sales Effectiveness Development Programme</i>	<ul style="list-style-type: none"> <li>• Consult Sales Management team</li> <li>• Write two-level programme specification</li> <li>• Screen external "Sales" training suppliers with e-learning credentials</li> </ul>	<ul style="list-style-type: none"> <li>• Issue tender invitations</li> <li>• Review proposals &amp; short-list</li> </ul>	<ul style="list-style-type: none"> <li>• Interview short-listed suppliers jointly with Sales Management</li> <li>• Select suppliers for both the Representative and Senior Representative programmes</li> <li>• Issue contracts</li> </ul>
2	<i>Example: e-Business Expert Selection &amp; Development</i>	<ul style="list-style-type: none"> <li>• Determine needs in consultation with functional management steering group</li> <li>• Update competency framework</li> <li>• Write 'e-Business Expert' role profile(s)</li> <li>• Determine assessment criteria</li> </ul>	<ul style="list-style-type: none"> <li>• Invite departmental nominations</li> <li>• Design Assessment Centre</li> <li>• Plan Assessment Centre resourcing</li> </ul>	<ul style="list-style-type: none"> <li>• Review nominations with steering group</li> <li>• Invite candidates to the Assessment Centres next quarter</li> </ul>
3	<i>Example: Orientation programme for 'merged' employees</i>			<ul style="list-style-type: none"> <li>• Form x-functional working party</li> <li>• Consult x-section of recent joiners</li> <li>• Determine programme content with / through the working party</li> <li>• Initial research on learning media, including where e-learning best fits</li> </ul>
4		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
5		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
6		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
7		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>