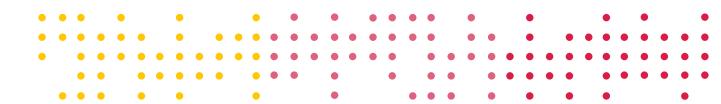**intertek**
wisetail ™

Showing ROI for Learning Programs
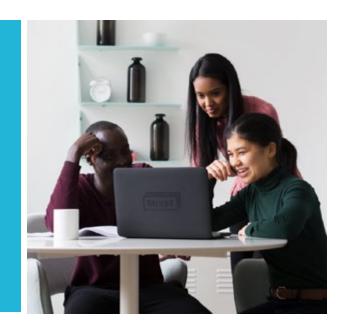## How to Justify Your People Strategies for Executive Support

OVERVIEW

What You'll Get

- A framework for generating buy-in on people strategies
- How to gain broad organizational support
- Examples of people strategies tied to business strategies
- A resource to help you put these ideas into action

Learning is, or should be, an integral part of every business strategy. Companies today cannot operate effectively with the stagnant mindset that employees are expendable.

Forward-thinking companies know that in order to meet business goals, they need to recognize and invest in people-first strategies that align with overall business strategies. Executives within these organizations are utilizing these people first strategies to retain top talent, increase revenue, enable sales channels for better business outcomes, and improve customer satisfaction.

In this whitepaper, you will learn the value of aligning learning and business strategies to gain justification for training, learning, and development programs. You'll also learn valuable tactics and metrics to help you measure and justify your new people strategies.

JUSTIFICATION & ROI

A people strategy is an important part of every great business strategy.

When a company creates its yearly organizational goals, it should also devote time to developing its people strategy goals. Learning and development should play a significant role in your people strategy — education impacts every level of your business.

- **Employees**. Continuous learning helps employees thrive and become more efficient within their roles, meet compliance standards, and stay engaged with company culture. They can stay on top of shifting trends and preferred techniques, especially as products and the world around them changes. This will help them achieve better results, provide better customer service, and more all resulting in increased sales and revenue.

- **Partners.** Partners benefit from continuous learning initiatives because they need to learn how to use products effectively, keep up with changes in their respective industries, be competitive within their markets, and act as leaders in their fields.

Today, many organizations don't put enough value into people strategies or learning and development, but that can easily be changed. A large part of the battle is disseminating the value of these strategies by tying them to the overarching goals. Too many L&D departments operate in a silo, only focusing on compliance and onboarding employees. The way to gain buy-in is to justify programs and show ROI, which isn't as daunting as it sounds.

PARTNER UP! YOU'VE GOT ALLIES

Partner up to give clarity to everyone in the business, so they understand the impact of learning and people strategies.

Bridging the Gap

> **The results we see are based on streamlined training process, which translates directly to ROI.**
>
> — Ryan White

If you can bridge the gap between business and strategies to support larger goals, you can create efficiencies and gain broader support. Build those bridges with other departments in your organization to gain stakeholder support, and to ingrain learning and development as an integral business strategy.

How do you do it? Dig into the operations of your organization to support learners across every department and function. Here are some questions you can ask to get started:

1. Do you have a sales team? Do they need to be trained regularly (promos, new products, etc.)? Is there a steep learning curve to productivity?

2. Do you have a partner channel? Do they need to be sales or technically certified?

3. Is there training involved for your customers to get the most from your products? Are there ways to inform customers of product updates, promos, or other initiatives? Do you know what causes customers to leave?

4. Do you have high employee turnover? Do you know what contributes to this — such as overly long onboarding, inadequate training, or employee morale issues?

5. How much does your training currently cost? How long does it take to onboard a new employee?

6. What tools do you use for training and internal communication channels?

7. What tools are used across each department? Can we consolidate redundant tools to present our CFO with a solution for improved productivity and lower costs?

"By placing an emphasis on how humans learn, and catering to their learning needs as individuals, companies are more likely to ensure employees' long-term success.

Partnering up with senior leadership is also essential. You need to understand the objectives of the business and they need to understand the impact that L&D can have on those goals. If you can offer programs that directly correlate to business operations, you'll gain executive support. Having a member of senior leadership as a sponsor, or champion, for each L&D initiative will help to ensure the values of these programs are seen throughout the organization.

Here are some examples of who should sponsor your programs:

1. The Chief Revenue Officer (CRO), VP of Sales, VP of Sales & Marketing, etc., should be the executive sponsor for sales training, sales enablement, and L&D programs that can directly tie to generating new revenue for the organization.

2. The Channel Chief, VP of Product Marketing, or VP of Channels should be the executive sponsor for partner training, certification, and enablement programs that generate revenue through selling channels.

3. The Chief People Officer and / or VP of L&D should be the executive sponsor for employee training and engagement programs.

4. The VP of HR should be the executive sponsor for all onboarding and compliance programs.

5. The VP of Customer or Client Success or the VP of Support should be the executive sponsor for all customer training and engagement programs.

6. Each department head should be a champion for formalizing programs that tie to talent development and promote upskilling, reskilling, and ongoing education.

It will be much easier to justify L&D expenditures and receive investment in initiatives from senior leadership when you have cross-departmental buy-in, can deliver measurable impact across multiple teams, and can show efficiencies — cost, operational, or both. Add an executive sponsor and you have a winning pitch for a long-term commitment.

FORMALIZE & DOCUMENT

90% of a good strategy is documentation and communication.

Saying that, treat your strategy as a living document. Set the expectation that it will be agile — based on data, feedback, and ROI — and continue to set those expectations early and often. Instill value in flexibility and you'll gain the freedom to test, document, and find the correct formula for your organization. A company strategy molds the decisions it will make over time. Be sure to set strategies to make intelligent near-term decisions, with long-term impacts in mind.

A great formula that is simple, effective, and easy to document is:

Decide ⟶ Do   Refine ⟶ Do

It sounds simple, because it is. Half the battle is getting started. If you don't know what you don't know, setting the expectations and acting as an "organizational learning scientist" will help you formalize, document, test, and refine strategy in an agile and flexible way to get the most out of your resources.

Decide ⟶ Do   Refine ⟶ Do

This process is essential to figuring out your people strategy. You want to go into the project with a clear, defined plan so you can present leadership with a hypothesis of how this strategy will impact your organization. All you have to do is decide what, or how, you want to do something, confer with leadership, and do it. From there, discuss results, identify changes to refine your process, and do it again.

REAL-WORLD EXAMPLES OF TYING PEOPLE STRATEGIES TO BUSINESS GOALS

This section will give you examples of how to tie people strategies to business goals. It's just the tip of the iceberg, but it will provide you with a starting point for success.

> " Creating promoters within the organization not only benefits the front end it also increases business acumen that benefits the back end.
>
> — Nick Kyle, Bagel Brands
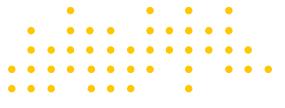
Goal: Customer Retention & ARR

Many companies have customer retention and annual recurring revenue (ARR) as goals. For this example, let's say the goal is to have a 98% customer retention rate. Whether the ARR goal is $10M or $500M, the underlying strategy will be the same: Invest in customer learning, satisfaction, and retention programs to maximize business outcomes.

1. **Invest in customer service training to ensure customer satisfaction.**

   - Making sure employees are equipped with the right training and tools will help boost customer experiences and satisfaction.

   - Market example: Crack Shack's customer satisfaction is out of this world. Crack Shack invested in Wisetail's learning management system and enabled all employees to be agents of customer service. Take a page from Crack Shack's book — enabled employees equals happy customers which equals increased customer retention and recurring revenue.

2. **Upskill or reskill workers to stay competitive in the market.**

   - Many restaurants will attest to their industry's unpredictability and their need to stay relevant and open as the market rises and falls.

   - Market example: Bagel Brands L&D team pivoted quickly to react to changing operational demands. Their L&D team jumped in to upskill and reskill workers to take on new roles within smaller teams. The speed and agility in providing training and communications are attributed to their use of their Wisetail platform.

"

94% of employees would stay with a company longer if there was an investment in learning.

— Gallup

Goal: Growth via Location, Markets, or Velocity

Fast growth can be exciting and scary all at the same time. If growth is a goal, first define the type of growth to understand what is needed to accelerate the business towards the goal.

1. **We need to launch X new locations in the next year.**
   - Scaling your business effectively requires sustainable strategies and repeatable processes. To experience success in times of expansion, your team must lean on repeatable, scalable, and consistent processes. One repeatable process to use is a reliable onboarding experience. While this process of expansion can be more complicated if you are a franchise, establishing training programs that are consistently applicable without demanding additional resources will help you get the buy-in you need from across your organization as it ties directly to organizational growth.
   - Market example: Over the next four to five years Crack Shack is set to go from six locations to 50, and open some of those in different markets. They are able to successfully grow because of the scalable programs they have created in their LMS. They can easily and efficiently provide each new location with the necessary training and communications to get up and running quickly and smoothly.

2. **We need to hire X new employees within X years.**
   - Effective interview and hiring processes are the first steps toward rapid personnel expansion. In a rapid growth phase, start by developing programs that pair manager recruitment training and recruiters to maximize the talent search. It's expensive to hire the wrong people, so enable your leadership and management teams with the skills to find the right fit. Then, shore up your onboarding. You want to build a company of brand-loyal employees, while speeding up time-to-productivity. Measure programs' impact on time-to-productivity to justify resources for training and employee retention programs and support people strategies.
   - Market example: Link Property Management has streamlined training + onboarding, and increased retention by implementing programs that promote brand-loyalty. Their most successful program includes amping up team recognition messages to show every team member they are seen and valued.

PLANNING PEOPLE PROGRAMS

> "To be a good leader, you need to be relentlessly positive. You need to be driven and lead by example. You also have to be supportive and empathetic.

— Ali Knapp, Wisetail

There are several frameworks for planning and mapping learning and development programs. No matter what framework you use, be sure to ask the right questions, evaluate your processes, and gain the correct stakeholder buy-in.

And remember, metrics are the language of any senior leadership team. Looking at ROI and how it impacts the goals of the over-arching business is a powerful tool. If you can effectively communicate strategic plans and how the metrics impact business outcomes, you can justify people strategies and programs.

SUMMARY: PUTTING IT ALL TOGETHER

To help you put these ideas into action in the real world, we've created a three part resource for you to walk you through reflecting, planning, and implementing your L&D programs. Download it now and let us know how it goes!

GET THE FULL RESOURCE

intertek **wisetail**

Learn more at **wisetail.com**