



Research insight

Aligning learning to strategic priorities

A discussion paper

Background

The CIPD Value of Learning project, recently completed, has stimulated a high level of interest among learning and training professionals who have recognised the need for a fresh look at evaluation. A key part of this reassessment is the need to focus on the alignment between learning interventions and organisational strategy. Alignment is a complex and difficult area for learning and development, however, and the CIPD recognises that many practitioners would value the opportunity to further develop their thinking and practice about this challenging issue.

This discussion paper aims to stimulate and encourage debate about the challenges of achieving alignment. It will consider the following questions:

- What is involved with alignment?
- How can we know that learning is aligned with organisational priorities?
- How does the 'business partner' role affect alignment?
- How can alignment processes be established and maintained?

There are links from this paper to an [*Alignment of Learning discussion thread*](#). Contributions to the thread will help to move the debate forward and should enable the identification of areas of practice and expertise that can enhance the alignment process. Using contributions to the discussion thread as well as responses to an online poll and the findings from the Value of Learning project itself, we will publish an online practical tool about the strategic alignment of learning and further written guidance. These will be available in April 2008 in time for the WFPMA World Congress/HRD.

A strategic approach to learning

Today's increasingly competitive service-led and knowledge-driven environment in which organisations operate has encouraged two important developments affecting learning and training professionals: the move from training to learning, and the requirement for a strategic approach to learning, training and development (LTD).

Organisations are increasingly accepting the importance of learning rather than training to underpin organisational performance. Whereas training tends to focus on skill-based behaviours delivered through content-based and instructor-led interventions, learning is a broader concept involving the acquisition and application of knowledge, skills or attitudes that result from formal or informal development, education or training experiences. This trend is discussed further in the [*CIPD Training to Learning Change Agenda*](#).

The change in emphasis from training to a broader concern for learning to foster individual and organisational performance has significant consequences for the role of LTD practitioners. The focus on a primary concern with training has been replaced with the requirement for practitioners, as business partners, to facilitate a range of different forms and opportunities for learning that offer benefits for the department and/or organisation as a whole (Sloman 2007).

In addition, many organisations are now recognising the strategic importance of human capital development. Human capital is the knowledge, skills and experience of the organisation's people. Organisations and governments alike now recognise that [*human capital and people development*](#) is an important part of organisational strategy and performance. Investment in learning provides the basis for the development of the organisation's human capital assets and this requires those involved in human resources development to fulfil a business partner role to make sure that LTD outcomes address the strategic human capital priorities of the organisation (Ulrich and Brockbank 2005).

What is involved in alignment?

Since the mid-1990s academics and practitioners, such as Michael Porter (1996) from Harvard Business School, have highlighted how alignment is needed to ensure the 'fit', 'linkage' or 'integration' of strategy and action. The quest for alignment focuses the learning function on the need to contribute to competitive advantage. The pursuit of alignment gives a clear direction to LTD activities and processes.

[*The Value of Learning project*](#) demonstrated the importance of establishing, through dialogue, an alignment of expectations between the LTD function and senior managers about the strategic contribution that learning makes to their organisations. By conducting separate interviews but using the same questions, it was possible to explore the extent to which alignment was evident. Responses to the interviews indicated some similarities but also some areas of difference in emphasis. The research indicated that learning is expected to contribute value through:

- ensuring the strategic readiness of employees (this was highlighted equally by LTD executives and senior managers)
- delivering performance improvement (this was highlighted more by senior managers)
- career/talent management processes (this was highlighted more by LTD executives).

Discussion questions

- To what extent are senior managers' and line managers' expectations of what learning can deliver similar or different?
- To what extent are the expectations that LTD professionals have of learning the same as (aligned with) those of managers in the organisation?
- How frequently is alignment discussed in the learning function in organisations in which you have worked?

You can use this link to respond to these questions.

[*Link to discussion thread*](#)

Alignment is clearly a good thing to aspire to, but achieving it in practice is difficult. One challenge is maintaining alignment in the dynamic and fast-moving environment in which many organisations operate. Organisational priorities can change and develop, sometimes with alarming rapidity. Realignment of learning processes may take longer to organise; changes to learning outcomes may be even harder to hurry.

There are also difficult choices to be made in resource allocation: should learning be directed at enabling the long-term aspirations of the organisation or the shorter-term imperatives? This challenge was highlighted particularly in a [*CIPD online poll in 2007*](#) where 82% of respondents agreed with the proposition that 'balancing the need to invest learning resources in addressing short-term issues as well as longer-term learning needs is a challenge in my organisation'.

A third area of difficulty, highlighted in the Value of Learning research, is that different aspects of learning may be the responsibility of a variety of [*different managers*](#) throughout the organisation.

Alignment may be 'easier said than done' but it is an important challenge that LTD professionals must meet if the learning function is to contribute strategic value to the organisation.

Discussion questions

- In your experience, what are the main difficulties with achieving alignment?
- Who is responsible for what aspects of learning and training in your organisation(s)? Are all features of learning and training equally aligned with organisational priorities?
- To what extent is the learning function able to determine the priorities for spending on learning and training activities?

You can use this link to respond to these questions.

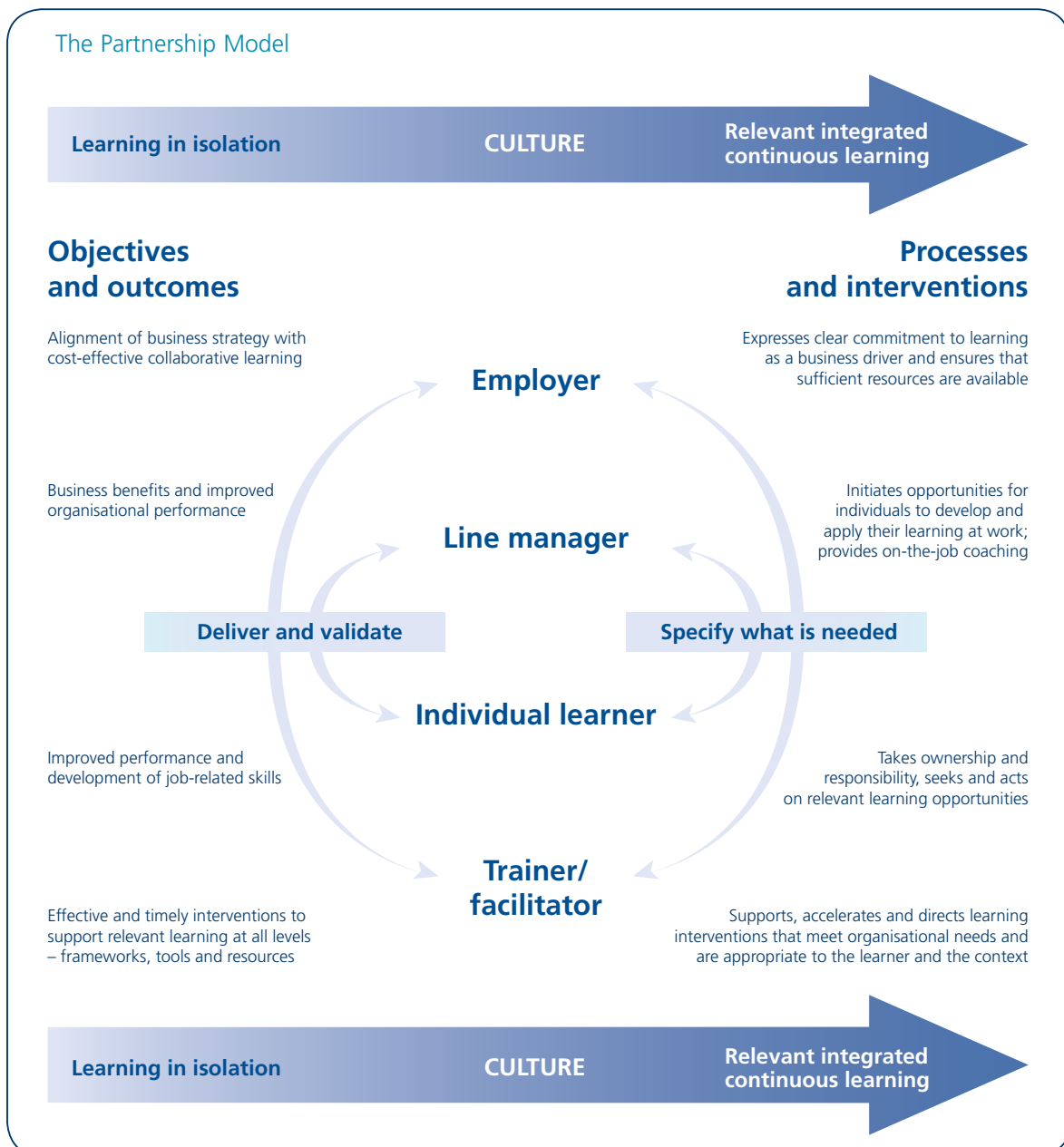
[*Link to discussion thread*](#)

Alignment and the business partner role

Recent CIPD research into the *Changing HR function* has shown the development of the function away from a 'service provider' to a 'business partner' role. Within the learning function, as elsewhere in HR, the increasing popularity of the business partner role does not, of itself, translate directly to strategic involvement.

However, the business partner role is closely associated with the aspiration to achieve alignment of learning to organisational priorities, be they operational or strategic.

These developments are reflected in the CIPD partnership model that was launched at the HRD conference in April 2006.



The term business partner implies a relationship with line managers in the organisation that is co-operative and involves shared responsibility for the achievement of goals. It can be said to involve a relationship of good faith, mutual respect, understanding and shared decision-making. These are generalised sentiments, however, and the Value of Learning project highlighted that a range of skills are needed, by LTD and senior managers, if business partnerships are to operate in an effective way. A range of formal and informal opportunities for dialogue are vital. In particular, alignment is easier to achieve if LTD practitioners have the skills and the opportunities to engage effectively in business planning processes. This point is further confirmed by [CIPD survey evidence](#), which indicates that organisations with regular and formalised processes to deliver and review learning and development activities are also more likely to have business-driven learning and development strategies.

In addition to involvement in formal business planning processes, LTD practitioners need to be able to convince others in the organisation, both formally and informally, to invest in learning through budgets that may or may not be held within the training and learning function. This will not occur unless managers can see that learning processes will make a difference to measures that are significant and relevant for their function, rather than addressing the agenda and priorities of the LTD function.

Discussion questions

- Does your organisation(s) encourage LTD practitioners to fulfil a business partner role? To what extent are you treated as an equal partner?
- What factors limit or enable the ability of learning professionals to achieve mutual respect and shared responsibility for the achievement of business goals?
- What skills have you identified as necessary to establish and maintain an effective business partnership in organisations where you have worked?

You can use this link to respond to these questions.

[Link to discussion thread](#)

The process of alignment

The Value of Learning project indicated that alignment is a complex process. Far from being a simple 'one-off' outcome, alignment involves a continuous process of reassessment by LTD professionals who seek to facilitate learning interventions that 'fit' with the strategic priorities of the organisation.

The issues raised in the Value of Learning interviews reveal some interesting features of practical relevance to senior managers and learning decision-makers. First, proactivity by LTD practitioners – both as a formal part of regular business planning processes and also through informal dialogue with other stakeholders – is very important. The business partner role means that LTD outcomes may well depend on managers throughout the organisation, not all of whom will be as aware of the potential benefits of the learning activities. Achieving alignment, therefore, requires LTD practitioners to be able to persuade managers to invest in the time and resources to enable learning to take place.

A particularly useful case illustration here is that of the VT Group plc where top management commitment to investing in learning enabled the HR director to play a full part in business planning and review processes.

Read the [VTplc case study](#).

Alignment is not just a matter of business planning, however, and the Value of Learning project indicated that LTD practitioners have to be able to influence decision-makers and line managers, both formally and informally, to undertake learning to meet business priorities as they arise. Whether the influencing processes take place through formal meetings or on an informal basis, the ability to make a 'value case' for learning makes it more likely that key stakeholders will support learning activities where they are required. A helpful illustration of the importance of making a value case is provided by the Tesco.com organisation, which you can read through the link below.

Read the [Tesco.com case study](#).

The Value of Learning project also highlighted how a large proportion of learning investment in some organisations is inherited on a year-on-year basis with the expectation that it will be directed to ongoing and established training and development processes. In such cases it is important that LTD practitioners guard against a 'drift' of learning and development processes away from emerging organisational priorities. Where such a pattern of investment is a strategic necessity, it is particularly important that LTD practitioners ensure a cost-effective use of this investment.

Alignment and the process of agreeing budgets that support learning processes are closely linked. Although most LTD professionals recognise that learning is an investment rather than a cost, this view is not always shared by their line management colleagues. In a CIPD [Value of Learning online poll](#), 57% of respondents agreed with the proposition that 'the organisation is more concerned to measure the costs and not the benefits of learning and training'. The achievement of alignment, therefore, is required if managers are to be convinced of the relevance of proposed learning interventions and to treat the activity as an investment rather than a cost.

Discussion questions

- How are strategic learning priorities identified in organisations in which you have worked?
- In your experience, what factors influence an organisation's choice as to whether and where to make their investment in learning and training?
- What skills do LTD professionals need to be able to make a business or 'value case' for investment in learning?

You can use this link to respond to these questions.

[Link to discussion thread](#)

The challenge for learning and development professionals

A strategic approach to LTD must be grounded in the alignment of learning processes with the organisation's strategic priorities. Strategic priorities change over time and different aspects of learning activities are often the responsibility of a range of different managers throughout the organisation. Constructive dialogue with managers at all levels is required to underpin the ongoing alignment of learning investments. Key issues for alignment are:

- ensuring an alignment between the expectations of managers and LTD professionals concerning what learning can contribute to the organisation
- ensuring that LTD professionals and line managers are equipped with appropriate skills to ensure the establishment and maintenance of an effective business partner relationship
- ensuring that alignment processes are fulfilled in a proactive and effective way, both formally and through informal and constructive dialogue
- involvement in business planning processes, being able to make and present an effective business or 'value case' for additional investment in learning
- continuously evaluating the business contribution of learning activities to ensure that ongoing training and learning activity does not suffer from 'strategic drift' over time.

As HRM and HRD professionals seek to explore the practical implications of alignment to deliver a strategic contribution, a number of challenges and questions are raised, some of which have been highlighted in this discussion paper. We welcome contributions to the strategic alignment discussion thread to help move the debate forward and share practical insights. Where do you think that the problems lie? Contributions will inform future CIPD publications that address the challenges of achieving strategic alignment.

You can use this link to respond to this discussion paper. [*Link to discussion thread*](#)

References and further reading

CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2005) *Training to learning*. Change Agenda. London: CIPD. Also available online at <http://www.cipd.co.uk/subjects/lrnanddev/general/train2lrn0405.htm> [Accessed 1 November 2007].

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