

How to Implement TDRp in Your Organization



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 **tdrp**
Talent Development
Reporting *principles*

Summary

Many want to improve the measurement and reporting in their organization but don't know what resources are available to guide them or how to get started. TDRp provides both the what and the how. Here is a 10-step plan to get you started with TDRp.

Step 1: Commit to Implementing TDRp

Step 2: Socialize the TDRp concepts

Step 3: Create multi-year plan

Step 4: Create Draft Organizational Outcome Statement

Step 5: Create Effectiveness and Efficiency Statements

Step 6: Create L&D Summary Statement

Step 7: Create L&D Program Reports

Step 8: Create Operations Report

Step 9: Integrate and Refine

Step 10: Review and Improve

Take a measured approach to implementing TDRp (or any large change) in your organization. One of the primary reasons for failure is an overly aggressive timeline which leads to disappointment, frustration, loss of confidence, and ultimately loss of support and funding. It is much better to start with a pilot, perhaps focusing on one area of large project, or a limited scope for a broader deployment. Learn as you go, build capability and confidence, demonstrate the value.

Step 1.

Commit to Implementing TDRp

Read the TDRp Whitepaper and Definition of Terms. Look at the sample statements and reports. Commit to implement TDRp within your organization. Assign responsibilities and Include specific actions in learning leaders' performance goals. Ensure that TDRp is a priority for the CLO or VP of Training to ensure successful implementation of improved measurement and reporting. Successful implementation should be a written performance goal for the CLO and those directly involved in the project. This is the "buy in" step. If the CLO is not willing to make it a priority, assign the necessary resources, and actively promote it, the effort will fail.

Step 2. Socialize the TDRp Concept

This is the change management step and its importance cannot be overstated. The benefits of talent development reporting need to be socialized within your organization, especially among your organization's leaders and learning professionals. Ensure all the leaders and key people in your own organization understand why you are implementing a new reporting framework and how it benefits them. Be honest about the amount of effort involved and when they expect to see results.

Step 3. Create a Multi-year Plan

Implementing TDRp will take several years. No organization completes this journey in one year. Given your resources and the complexity of your organization, decide on a reasonable time line with milestones to implement TDRp. Consider starting with a pilot that focuses on one particular program, unit or region. It will also be easier if you begin with a limited number of measures. You can always add more later. Identify the supporting processes and systems to provide the desired measures and reporting capabilities. Some existing ones may need to be modified and others will have to be created.

Step 4. Create the Business Outcome Statement

Read your organization's business and strategic plans and talk with your CEO and senior leaders to understand goals and priorities. Focus on the highest-priority goals of the organization and the key learning programs. Be selective; don't try to include all the goals and programs, or you will never get off the ground. A good high-level Business Outcome Statement should be only one page in length and focus on no more than 10 key organization goals.

(Note: In Steps 4-8 the word "create" means plan the rows and columns of the statement or report. You must decide which measures to include and what format the table will take. You will be able to show historical data as well as plan or goal for the year, but in the beginning of the year you will not have any actual results to include.)

Once you have identified the organization goals to include, visit with the sponsor or stakeholder for each one to determine if learning has a role to play in achieving the goal. If it does, then you and the sponsor need to agree on a measure of success for the goal (like a 10% increase in sales which hopefully already exists as part of the business plan for next year). Next, you and the sponsor need to agree on how to measure learning's impact on the goal (effectiveness measures). You might agree to use the application rate (level 3), the isolated impact of learning (level 4), or a proxy for impact. Once you have agreed on the measure, you will need to agree on the planned impact of learning for the year (or initia-

tive) such as a planned application rate of 80% after three months or that learning will contribute 50% to the achievement of the goal. In some cases the impact of learning will be qualitative (like high, medium, or low). The key to step 4 is to have the discussion proactively with the sponsor and agree on measures of success.

Step 5. Create the Effectiveness and Efficiency Statements.

Start with the measures you already have. Review the measures in the Whitepaper to see what other measures you would like. Plan to refine or add measures each year until you have the optimum set of measures. Don't get discouraged; this process will likely take 2-3 years.

Typically, for the Effectiveness Statement, every organization will want to report levels 1 (satisfaction and forecast for application and impact) for all courses and 2 (amount learned) where applicable. Application (level 3) should be reported for at least a few high-priority courses. Impact, even if only the participant's or sponsor's forecast, should be reported for a few. At a minimum, the effectiveness measures used in the Outcome Statement will need to be reported for some programs.

A high-level Effectiveness Statement will probably be about a half page. For the Efficiency Statement there are many measures for your consideration. Look at the different categories and decide first what categories are most important for the coming year. Then select some measures from those categories that are most important. Typically, every organization will show some participant counts, course counts, and utilization rates. Decide which measures make sense for you. If you do not have a learning management system (LMS), you may be limited in what is easily available. A high-level Efficiency Statement may be one-half to two pages.

Step 6. Create the L&D Summary Report

Now that the three statements have been created, you are ready to create the high-level L&D Summary Report by selecting the key measures from each of the three statements that you 1) want to actively and visibly manage on a monthly basis and 2) believe will be of most interest to your CEO and senior leaders. After you create the draft, share it with your organization (CEO, SVP for HR, governing board) and learning leaders, and then incorporate their feedback as appropriate. Keep the the L&D Summary Report to one page if possible (no more than two) and ensure you provide a year-end forecast for each measure. Remember, this is an executive-level report for the CLO to share with the CEO and other senior leaders to update them on year-to-date progress against agreed upon goals. In short, it must show what impact learning is having on achieving the organization's goals and whether learning is being well managed.

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Step 7.**Create a Program Reports**

Create a Program Report for each key area such as leadership, marketing, and compliance. At a minimum, create a report for each program which is included in the Outcome Statement and the L&D Summary Report. Use these reports monthly to manage the development, design, delivery and impact of key learning activities. Keep the Program Report to about a page for each program and expect to develop 5-15 reports for your organization. Again, ensure you provide a year-end forecast for each measure since you are actively managed then against an agreed-upon plan.

Step 8.**Create the Operations Report**

Create the Operations Report by selecting the key measures from the Efficiency Statement that you will actively and visibly manage on a monthly basis. Include a year-end forecast for each measure. This will be a subset of the measures in the Efficiency Statement. Remember, this report is meant to focus on just those efficiency measures the CLO intends to actively manage. A high-level Operations Report should not be more than two pages. More detailed reports may be created for the management of individual programs and initiatives.

Step 9.**Integrate and Refine**

A new approach like TDRp will not succeed unless it is integrated into your monthly management processes. TDRp statements and reports should be used on at least a monthly basis to run learning like a business to ensure that planned results are delivered. Use them as the foundation for meetings on outcomes, effectiveness, and efficiency. Integrate information systems to reduce manual work. As you gain experience with TDRp, you will identify opportunities to refine the statements and reports as well as the systems and processes to produce them. Don't worry about creating "perfect" statements and reports at the outset. First, they never will be perfect, and second, they will change each year.

Step 10.**Review and Improve**

Set time aside to review TDRp implementation progress regularly. In the first year, progress in implementing TDRp should be on the CLO's agenda every month. Once implemented, learning leaders should update the multi-year journey plan at least once every year. Review lessons learned and identify opportunities for further improvement.

Conclusion

This is a big undertaking. Do not get discouraged or give up. All of this may seem overwhelming but it can be done. Remember, GAAP was not implemented overnight for accounting (first introduced in 1939). Assess your current state of reporting and take small steps forward to produce early successes and breed confidence. Focus on the most important and meaningful measures for your organization. The key is to JUST START.