COGNOTA

eBook

Talent & L&D Excellence:
Your 5-Step Strategic Framework

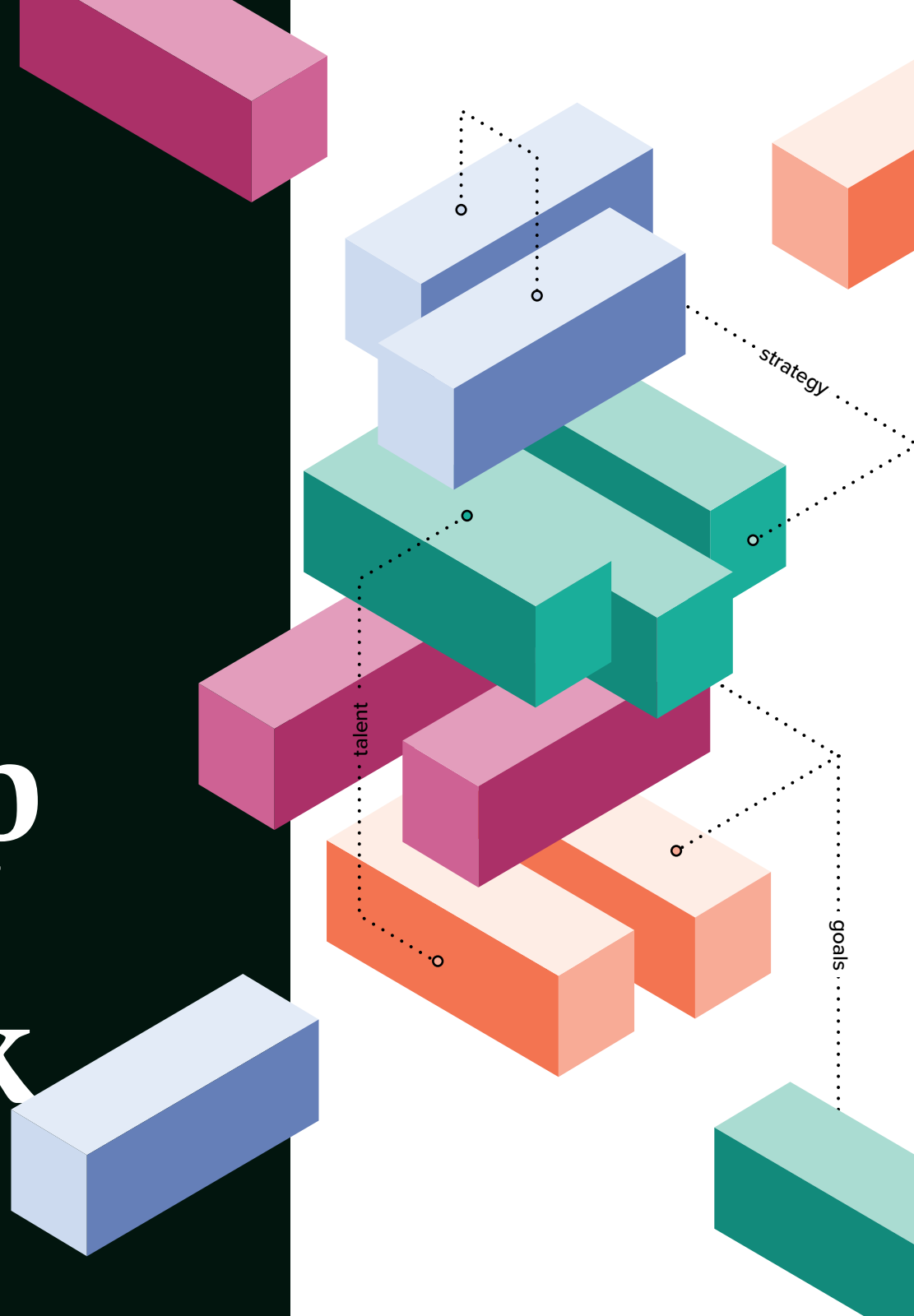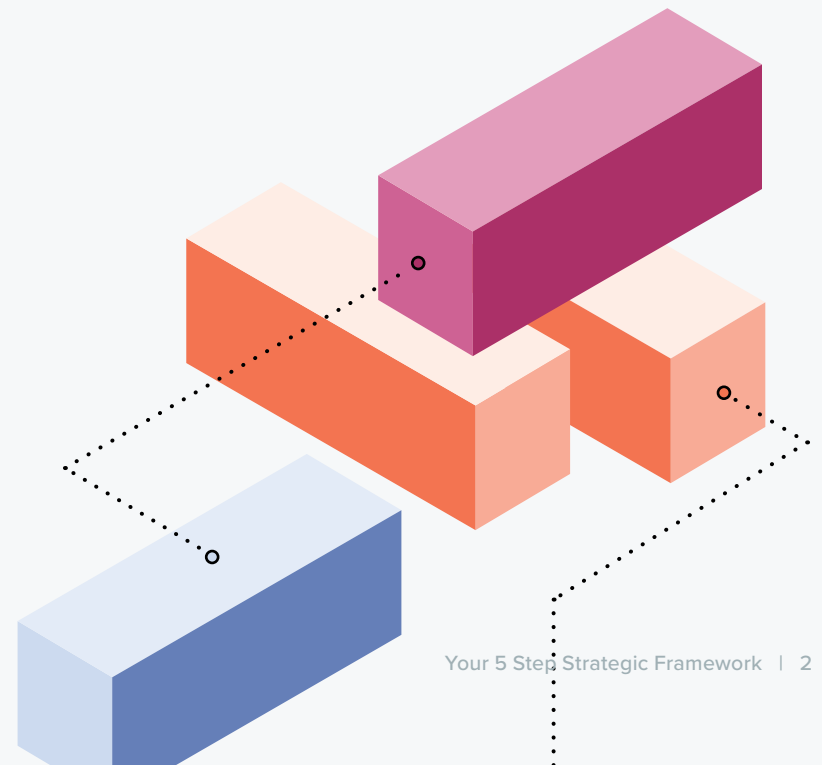strategy

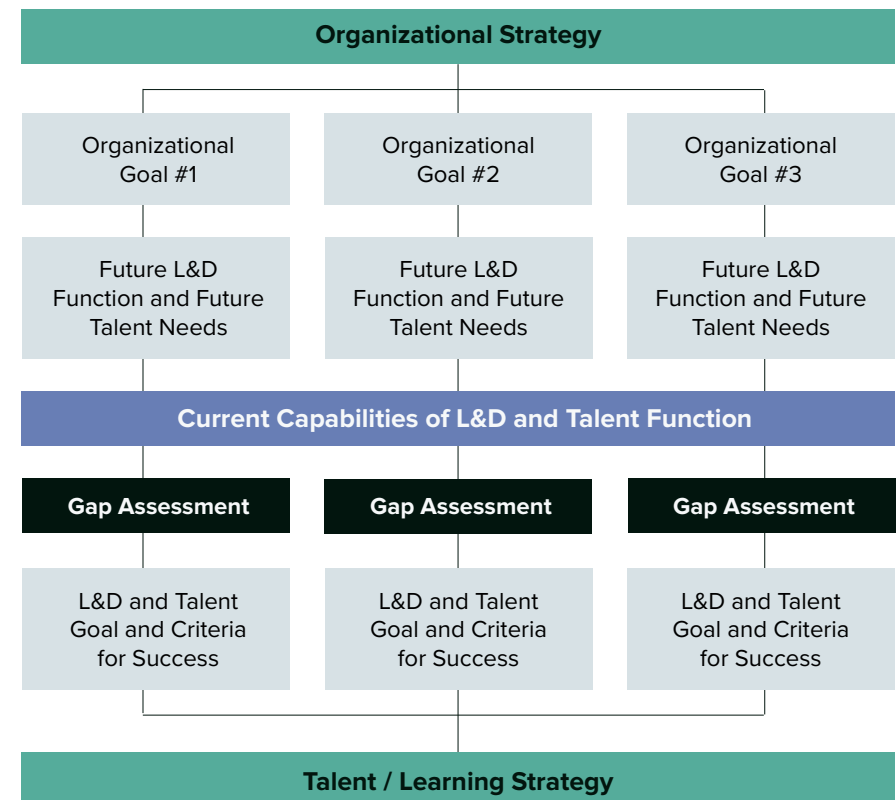talent

goals

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Strategic Planning Framework

Research shows that only 32% of Talent and L&D leaders have a strategic planning process that is fully aligned with their organization's broader business planning.

To create a well-integrated strategy, follow these five key steps:

1. Gain a clear understanding of your organization's objectives and strategic direction.

2. Identify the critical skills and capabilities needed for future success.

3. Assess current workforce strengths and gaps to determine areas for development.

4. Establish clear Talent and L&D goals along with measurable success criteria.

5. Effectively communicate the strategy to ensure alignment and engagement across all stakeholders.

Strategy Framework

Organizational Strategy		
Organizational Goal #1	Organizational Goal #2	Organizational Goal #3
Future L&D Function and Future Talent Needs	Future L&D Function and Future Talent Needs	Future L&D Function and Future Talent Needs

Current Capabilities of L&D and Talent Function

Gap Assessment	Gap Assessment	Gap Assessment
L&D and Talent Goal and Criteria for Success	L&D and Talent Goal and Criteria for Success	L&D and Talent Goal and Criteria for Success

Talent / Learning Strategy

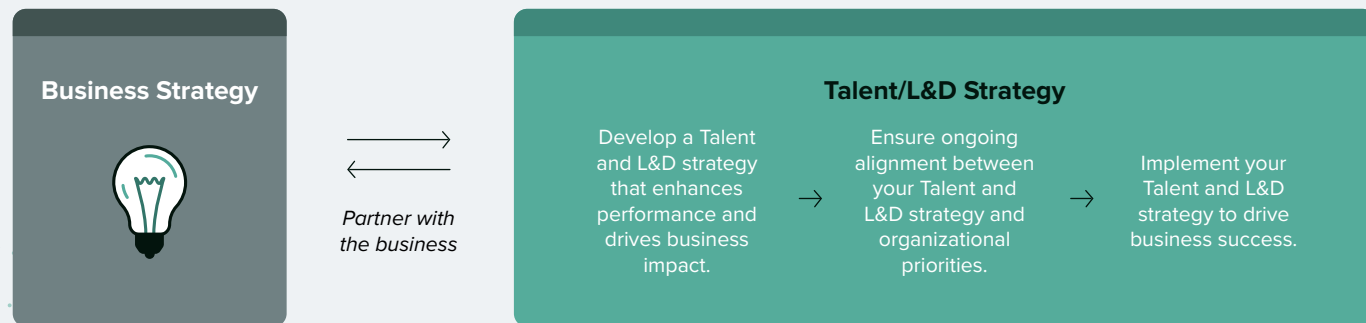# Understand Your Organization's Strategy and Goals

The foundation of an effective strategy begins with a deep understanding of your organization's mission, overall strategy, and business objectives.

Ensuring that Talent and L&D initiatives are aligned with these core elements not only drives meaningful business outcomes but also strengthens the case for future learning investments. To achieve this, Talent and L&D leaders should collaborate closely with senior executives to clarify how business priorities translate into actionable goals for the L&D function.

Tips to align strategy with business priorities:

- Regularly engage in one-on-one discussions with the CEO or key business function stakeholders, whether in formal meetings or informal settings, to stay aligned with their priorities and strategic direction.
- Collaborate with the CFO Office by consistently reviewing financial reports, analyzing profit-and-loss statements, participating in business reviews, and aligning on financial goals and initiatives.
- Assess quarterly reports and discuss key research insights with business functional leaders to evaluate their impact on business priorities and decision-making.

Relationship Between Business and Talent/L&D Function

Business Strategy

Partner with the business

Talent/L&D Strategy

Develop a Talent and L&D strategy that enhances performance and drives business impact.

→

Ensure ongoing alignment between your Talent and L&D strategy and organizational priorities.

→

Implement your Talent and L&D strategy to drive business success.

02

Determine Needs for Future Skills and Capabilities

Talent and L&D leaders must engage with business unit leaders to understand how organizational goals affect their workforce. By consulting department heads early in the strategy development process, they can identify specific talent and learning needs for each function. Prioritizing these partnerships based on business objectives ensures that Talent and L&D initiatives are aligned with the company's broader strategy.

Sample questions:

- What talent capabilities and workforce competencies are essential to drive the organization's strategic objectives and desired business outcomes?

- Which talent and L&D initiatives, if implemented, would have the greatest impact on accelerating performance, productivity, and business results?

- How do workforce-related risks (e.g., skill shortages, competition, retention) impact business performance, and what is their projected financial or operational effect?

- Which talent challenges are recognized by both leadership and employees as critical barriers to achieving business success, and how can they be quantified for measurable improvement?

Examples of Talent Capabilities Required to Achieve Business Objectives

Business Need	Talent Capabilities
Leveraging advanced analytics to drive new product development	Data Science & Big Data
Transitioning to a more remote and digital work environment	AI-Powered Automation & Virtual Collaboration Tools
Exploring immersive technology solutions for consumer and enterprise applications	Augmented & Virtual Reality Development
Navigating mergers and acquisitions in a consolidating industry	Change Management & Strategic Integration
Accelerating product development to stay competitive	Agile Methodologies & Rapid Prototyping

Strategic Priority — Leveraging advanced analytics to drive new product development

Business Challenge — Transitioning to a more remote and digital work environment

Emerging Trend — Navigating mergers and acquisitions in a consolidating industry

03

Assess <mark>Existing</mark> Skills and Capabilities

Assessing the organization's current skills and capabilities helps Talent and L&D leaders understand how well the workforce aligns with business strategy and future demands. By collaborating with executives across departments and engaging L&D leadership, they can evaluate existing competencies, pinpoint gaps, and determine areas requiring development.

Depending on strategic priorities, the current workforce may need upskilling or reskilling to meet future business needs. This evaluation provides valuable insights to shape talent development objectives and align learning strategies with organizational goals.

Organizational Goal	Launch a new digital product line
Are the Required Skills Available? (Y/N)	No
Do We Have the Necessary Resources to Execute? (Y/N)	No
If No, What Skills and/ or Resources Are Needed?	Upskilling employees in digital marketing and e-commerce strategies
Budget Considerations	• Investment in digital tools and platforms • External training programs for marketing teams • Executive coaching sessions
Is a Business Case Required?	No

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Define Strategic Goals and Success Metrics in Collaboration with Business Partners
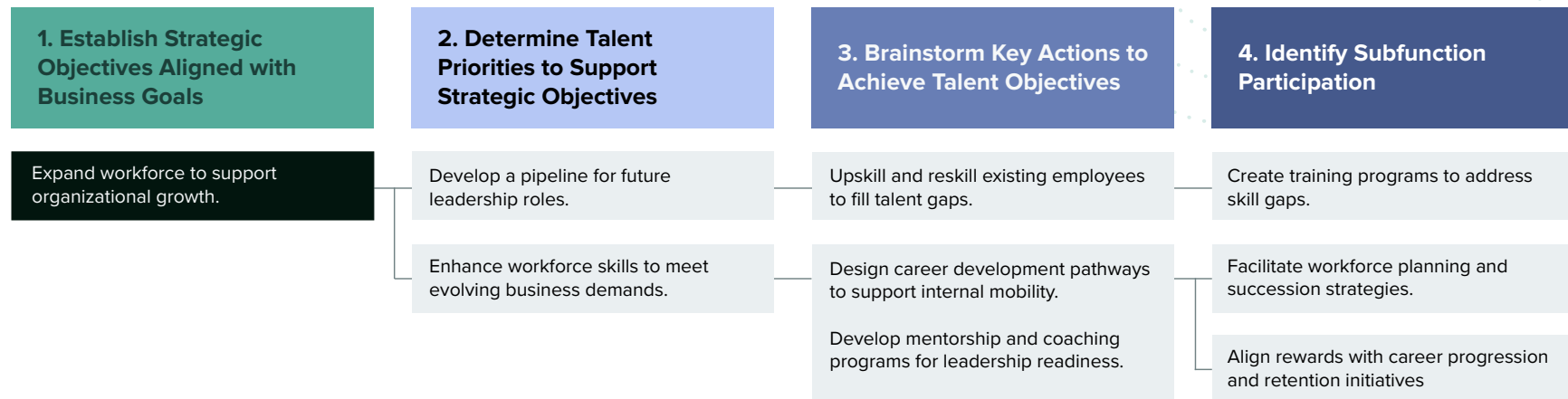
To ensure alignment between Talent and L&D initiatives and business partners, it is critical to establish clear, measurable goals that drive strategic execution. Goals should be designed with a common understanding of business goals, prioritizing those that will have the greatest impact on organizational performance.

Consider:

- Aligning goals with business priorities, ensuring they contribute to operational efficiency and bottom-line results.

- Define key performance indicators (KPIs) that measure effectiveness, business impact, and ROI.

- Ensure all metrics are specific, outcome-focused, and directly linked to business objectives.

By integrating performance measurement into strategy execution, organizations can validate the effectiveness of their talent and L&D investments and continuously optimize learning initiatives to drive measurable business impact.

| 1. Establish Strategic Objectives Aligned with Business Goals	2. Determine Talent Priorities to Support Strategic Objectives	3. Brainstorm Key Actions to Achieve Talent Objectives	4. Identify Subfunction Participation
Expand workforce to support organizational growth.	Develop a pipeline for future leadership roles.	Upskill and reskill existing employees to fill talent gaps.	Create training programs to address skill gaps.
	Enhance workforce skills to meet evolving business demands.	Design career development pathways to support internal mobility.	Facilitate workforce planning and succession strategies.
		Develop mentorship and coaching programs for leadership readiness.	Align rewards with career progression and retention initiatives

Effectively Share Your Strategy

Craft a clear and compelling narrative that captures the essence of the Talent and L&D strategy, emphasizing key objectives for the upcoming year. Use storytelling techniques to make the strategy relatable and engaging for different stakeholders.

Stakeholders/Audience	Storytelling Tips
C-Suite and Executive Committee	• Present a high-level overview of how the Talent & L&D strategy aligns with overall business objectives. • Highlight major shifts, such as new learning initiatives, workforce planning adjustments, or technology investments. • Emphasize measurable impact, demonstrating how L&D contributes to business growth, innovation, and ROI.
Business Unit Partners	• Engage in direct discussions with each business leader to align L&D initiatives with their team's specific needs. • Showcase how the strategy enhances team performance, upskilling, and business outcomes. • Provide data-driven insights on how learning investments will address skill gaps and increase probability of success to meeting business objectives.
Direct Reports to Head of Talent, L&D, and/or HR	• Identify influential regional or global L&D champions to drive adoption and advocacy. • Address potential resistance by proactively engaging key stakeholders in discussions. • Break down the strategy into actionable steps for different teams, ensuring clear roles and responsibilities. • Use targeted messaging for different subgroups, focusing on their specific contributions to the strategy's success.
Managers & Employees	• Connect the strategy to broader business goals, helping employees understand its relevance. • Communicate how learning initiatives will enhance career development, upskilling, and job performance. • Provide clarity on expected changes in workflows, responsibilities, or available learning resources. • Address potential concerns, ensuring employees feel supported and engaged in the process.
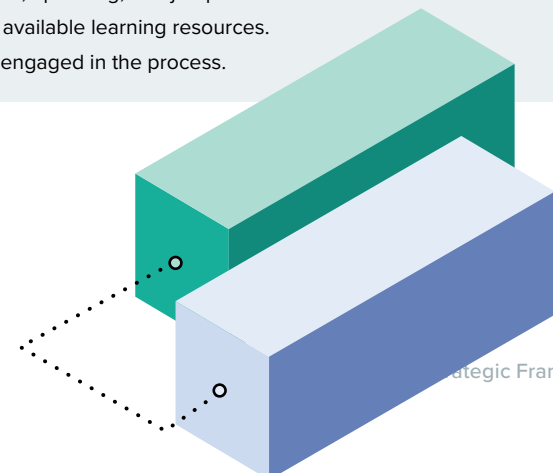
Strategic Plan Visualizing Your Talent & L&D Strategy

Vision Statement

Define the future direction of your Talent & L&D function and its impact on the organization.

Example: Empower a skilled, agile workforce by investing in continuous learning, cutting-edge development programs, and a culture that fosters growth and innovation.

Statement of Strategy

Create a clear, concise summary outlining the Talent & L&D strategy, the desired future state, and key initiatives to achieve it.

Example: Launch a structured learning and development framework to enhance workforce agility, upskill employees in emerging competencies, and align talent initiatives with business priorities for long-term growth.

Current State

Key Metrics Defining Your Current Talent & L&D State

Do
- Establish baseline measurements to track progress toward strategic talent and L&D goals.
- Identify potential risks that could impact workforce readiness and business performance.

Don't
- Overcomplicate metrics with excessive operational details that do not contribute to strategic decision-making. For example, Level 1 Measurement details.

Employee Retention Rate for High-Priority Roles – 60%

Percentage of Workforce Meeting Required Skill Proficiency Levels – 55%

Plan

Key Initiatives to Achieve the Target Talent & L&D State

Do
- Align with stakeholders
- Build strong buy-in
- Prioritize resources strategically

Don't
- Move forward without consensus

Example: Implement a Learning Model to support productivity

Example: Develop a program to attract and retain employees

Critical Assumptions for Talent and L&D

Do
- Articulate key assumptions
- Define benchmarks
- Be flexible for adjustments

Don't
- Introduce ambiguity that could lead to misalignment
- Overlook potential risks

Example: Emerging skill sets may require sourcing talent

Example: L&D budgets will remain limited so prioritizing is key

Future State

Key Metrics Defining Talent & L&D Success

Do
- Clearly define the ideal workforce outcomes and learning impact.
- Establish measurable goals with realistic timelines to track progress.

Don't
- Set objectives that are too far removed from current capabilities, making success unattainable.

Example: Leadership succession readiness – 95% of key roles covered by internal candidates by 20XX.

Percentage of workforce proficient in critical future skills – 80% within 12 months.

Strategic Framework Template: Talent & L&D Plan

Vision Statement

Statement of Strategy

Current State

Key Metrics Defining Your Current Talent & L&D State

Plan

Key Initiatives to Achieve the Target Talent & L&D State

Critical Assumptions for Talent and L&D

Future State

Key Metrics Defining Talent & L&D Success

Additional Tools and Resources

Software
Cognota's LearnOps Platform

Measure business impact and return of learning investments on business goals with easy-to-use software.

Book a Demo

Certification
LearnOps Academy

Earn a LearnOps certification and gain the expertise to transform learning operations and drive measurable business impact.

Enroll Now

Community
World's largest LearnOps Group

Join our free community to connect, collaborate, and learn alongside industry peers, sharing insights and best practices.

Join for Free

Free Workshops
Enhance Your LearnOps Strategy

Gain insights, earn valuable credentials, and enhance your LearnOps strategy in a free, interactive virtual experience.

Register

About Cognota

Cognota is the market leader in learning operations software. As pioneers in this field, our LearnOps® platform is designed to give L&D teams better visibility into the training needs of their businesses and replace disparate tools so they can be more efficient, effective, and measure the ROI of learning investments.

SOLENIS   The Washington Post   Texas Health Resources

ChenMed   Sun Life
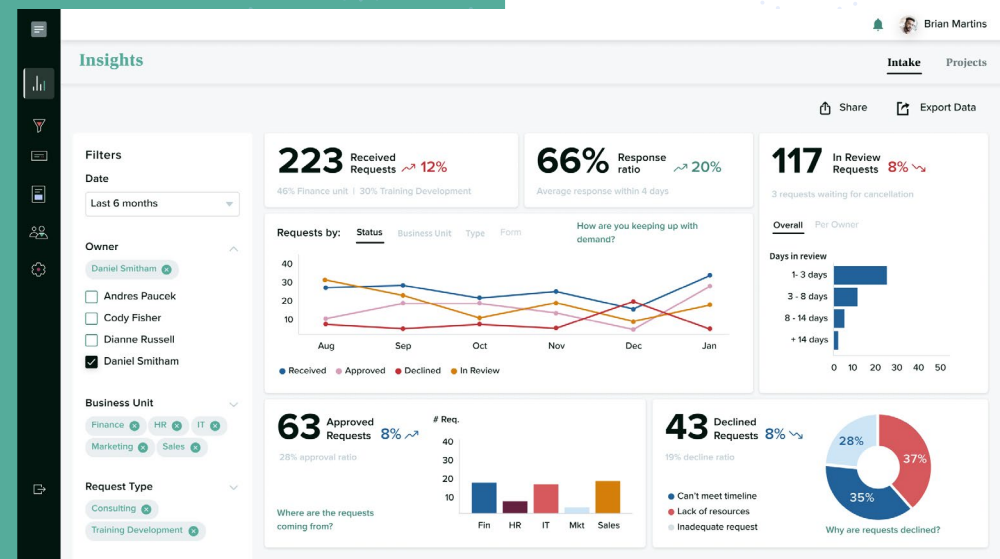
We Help Accelerate Your Team's Success

Technology is just one part of it. We partner closely with your organization to provide industry-leading assistance and expertise to get your organization on the path to running L&D like a business.

We have over a decade of experience **implementing learning operations solutions**, so teams can accelerate their time to market, resulting in a distinct competitive edge. Our teams will implement a common taxonomy, assist with new processes, provide change management best practices, and set up the KPIs that matter to your business.

Ready to take the next step with Cognota?

Contact us and we will help you build a complete business case for a learning operations solution based on your unique capability enablement needs.

Get Started

Brian Martins

Insights

Intake   Projects

Share   Export Data

Filters

Date
Last 6 months

Owner
Daniel Smitham
Andres Paucek
Cody Fisher
Dianne Russell
Daniel Smitham

Business Unit
Finance   HR   IT
Marketing   Sales

Request Type
Consulting
Training Development

223 Received Requests ↗ 12%
46% Finance unit | 30% Training Development

66% Response ratio ↗ 20%
Average response within 4 days

117 In Review Requests 8% ↘
3 requests waiting for cancellation

Requests by: Status Business Unit Type Form

How are you keeping up with demand?

40
30
20
10

Aug Sep Oct Nov Dec Jan

Received Approved Declined In Review

Overall Per Owner

Days in review
1- 3 days
3 - 8 days
8 - 14 days
+ 14 days

0 10 20 30 40 50

63 Approved Requests 8% ↗
28% approval ratio

Req.
40
30
20
10

Where are the requests coming from?

Fin HR IT Mkt Sales

43 Declined Requests 8% ↘
19% decline ratio

28%
37%
35%

Can't meet timeline
Lack of resources
Inadequate request

Why are requests declined?

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