

Toolkit Guide & Best Practices

In this quick guide, you'll find some tips and best practices for conducting a value-driven audit of the learning department and how best to use the items in the audit toolkit to keep you on track.

Your audit can be as in-depth as you need it to be. In fact, the more granular and in-depth as possible, no matter what area of the L&D department you are auditing. It can also be a highly time consuming task. So, while it's worth it to dedicate time to an audit, you can break up your timeline to audit one area at a time.

In this toolkit, you'll find frameworks for assessing the current state of your learning strategy, processes, learning technology stack and learning data and analytics. But you can customize the tracker and checklist to incorporate many items, including the performance of your learning program, organizational skills gaps, external vendor relationships, and many more.

How to Plan Your Audit

Careful and concise planning is absolutely essential to performing an audit that produces actionable insights. The cornerstone of your audit planning means asking: how can you analyze your current state in such a way that your audit provides:

- An accurate assessment of current performance
- Insights that provide guidance on how you can add value to your L&D department
- Next steps on making improvements

If you don't plan with this in mind, you can end up with a current state analysis that tells you very little about where gaps exist.

Planning your audit includes defining:

- The scope of your audit - what will you be auditing and why?
- Who will be included in executing the audit
- The complete timeline of the audit and any milestones you need to mark
- How you will execute the audit (including data requirements and any interviews or surveys you will conduct)
- The parameters you will use to define the current state of each audit element

What to Document

An audit is a long process with many moving parts. Keeping track of your progress means carefully curating documentation along the way. This documentation will enable you to compile your findings and produce a report in an organized and orderly way.

You should document everything from your planning process to your audit results and everything in between, including:

- A thorough audit plan and timeline
- The results and notes of any audit activities
- The findings of each step in your audit

You can use the checklists and audit tracker in the toolkit to record your documentation and keep yourself on track.



Progress Tracking

Since an audit is a time consuming, detailed activity, it takes a high level of commitment. Without timelines, deadlines, and milestones, it's easy for your audit to become derailed or deprioritized in favor of day to day operations.

The tracker in this toolkit, you can create a detailed timeline and record your progress to keep the audit top of mind and running smoothly.

Compiling Your Report

At the end of your audit, you'll have compiled lots of findings by producing a current state analysis against which you can examine your departmental goals and performance objectives. This information can be shared with stakeholders when it comes to things like budgets and resources to influence strategic decision making.

You can use the audit report template in the toolkit to begin to compile the results of your audit and include any recommendations or findings.

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