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Standardized Approach to Training Requests

Step 1 - The Requester's Details

Step 2 - The Training Details

Step 3 - Capturing the Potential Business Impact

Our request intake is manual, so it just comes in through email or face to face. You track it in a spreadsheet to keep track of all.

Samual,
L&D Manager

"We need to be in the initial conversation if we are really going to add value. When requests come to us later in the process there is no room for us to consult."

Joanne,
L&D Senior Manager -

Top Tip

You may want to **create multiple forms** according to different use cases that are typical to different departments. For example: **sales enablement,** compliance, or safety training.

eBook

Managing Training Intake for Strategic Success

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Introduction

L&D has been steadily gaining recognition for its organizational impact. The 2019 LinkedIn Learning Report found that L&D teams are receiving significantly higher budgets and increased executive support for corporate learning programs in comparison to previous years.

As expectations rise, there is an increased pressure on L&D to quickly deliver effective solutions that have a meaningful impact on organizational goals and the bottom line. The process for training intake has a significant role to play in delivering those solutions. However,our clients often express that the current approach used in their organization presents challenges:

> **"We need to be in the initial conversation if we are really going to add value. When requests come to us later in the process there is no room for us to consult or to verify that the solution is addressing the real issue."**
>
> **-Joanne,**
> **L&D Senior Manager -**

To overcome these challenges and deliver on expectations, L&D teams need a strategic approach to managing and prioritizing training intake. The approach consists of two critical components:

- **A framework for assessing and prioritizing training requests against your organization's strategy, goals and current business needs.**
- **A standardized process and the right tools to facilitate training intake, management, information gathering and decision making.**

In this eBook, we examine these two components and show how to successfully manage your training intake process and contribute to strategic success for L&D.

Taking a Strategic Approach to Prioritizing Requests

Each request for training/support you receive as an L&D team is important. However, if you are like many organizations we work with, the capacity of your L&D department has constraints. Prioritization of requests is necessary to ensure you are maximizing the value you provide your organization, without overworking your team. The following tips will help you assess and prioritize training requests quickly and effectively

Reflect your L&D strategy

Your strategy is the foundation of your training request prioritization. How robust it is will depend on your organization, but at a minimum it should include goals and tactics aligned to your organization's strategy and budget. If you need assistance with developing this strategy, Metrix can partner with you.

Keep Agility in Mind

Though an L&D strategy is critical, it would be a mistake to follow it with rigidity. Our world is ever-changing and adaptability is critical. Your Sales, Operations and Marketing departments have learned to stay agile and adapt quickly to market disruptors and new opportunities. So too should L&D. Providing employees with the knowledge, skills and support they need to deliver on organizational goals is how L&D provides value to stakeholders.

Taking a Strategic Approach to Prioritizing Requests

Both a scorecard and process for training requests are areas that are not always well-understood, but can have deep impact on your team, department and organization. With that in mind, we will now take a closer look at how you can use these tools and tactics to increase your efficiency and the strategic value you add to your organization.

Assess against a scorecard

There are multiple considerations when prioritizing or approving a training request. To facilitate these decisions and ensure they can be made strategically, quickly and consistently, we recommend the use of an assessment scorecard. See figure 1.1 below for an example of how a typical Training Request. Assessment Scorecard is structured.

Create a standardized process for training requests

The right tools and processes can dramatically streamline your intake process and ensure you are capturing the information you need during the initial request that will allow you to make strategic decisions.

Executing Against Your Assignment Scoreboard

Demonstrating L&D's strategic value to the organization can mean balancing between delivering on expectations and a realistic division of your resources. To maintain this balance, your approach to training requests must be based on a framework that takes the merits of each individual request into account. Each request can be quickly assessed and prioritized by using an assessment scorecard and evaluation continuum. The first step is to assess each request against a scorecard to determine the number of quadrants that apply to the individual request.

Figure 1.1: Training Request Assessment Scorecard

1 POINT

Address skills, capabilities and/or competencies of your L&D strategy

Your strategy acts as a guiding light, ensuring that your activities are pushing towards the results that will contribute to, and even drive, your organization's strategy. As part of your fiscal year planning, you are likely selecting key initiatives for the year that align to your strategy. As new training requests come through, assessing their alignment to your strategy is a helpful way to ensure that the requests you prioritize are going to drive organizational results.

1 POINT

Address market disruptors/industry trend(s) or opportunities

To support a workforce who must remain agile, L&D should be constantly aware of the market forces affecting your organization and the knowledge, skills and behaviors employees must have to take advantage of these opportunities or adapt to these disrupters. Any new request made that aligns with these factors should be given appropriate weighting in your assessment of its merits and evaluation of its priority.

1 POINT

There is high stakeholder commitment/ motivation to partner

Organizational will is needed to drive any true change or employee development. There must be support for this project throughout its life cycle - through development, implementation, and sustainability. That is why stakeholder commitment is a critical factor in determining if a request should be prioritized. It is important to note that the role the stakeholder plays in the organization is also important - do they have the ability to champion at the executive level (or are they on the executive team?). The role of the stakeholder within your organization affects the weight you put on this category in your assessment.

1 POINT

There is budget to put toward this need

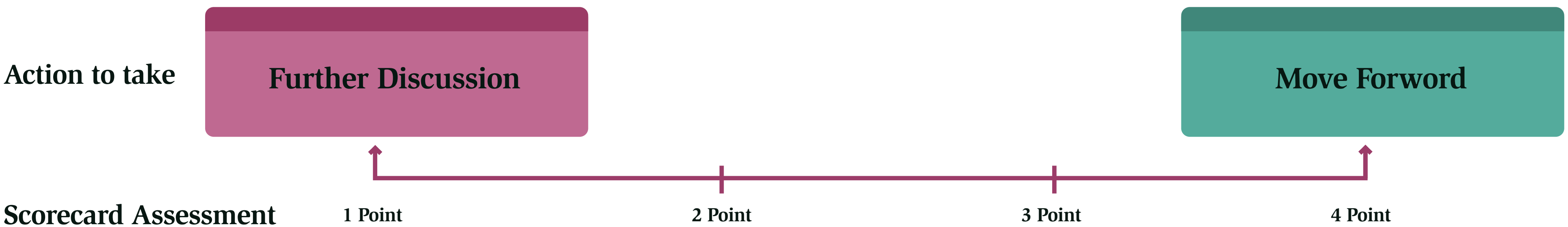
Depending on the ask, there may be a corresponding need for investment if the request is to be prioritized. Ask yourself if you require the following to deliver:

- Outside expertise to develop the content?
- Travel and/or accommodation?
- New technology?
- Vendor support?

Executing Against Your Assignment Scoreboard

The evaluation continuum applies an action to the value of the request as determined by the scorecard. That action may be to move forward immediately with fulfilling the training request, or to await further discussion with the requester or the wider L&D team. The number of quadrants, from the scorecard, that apply to the request is a strong indication to either move forward or discuss the request further.

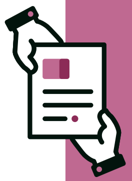
Figure 1.2: Evaluation Continuum



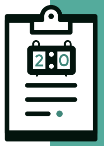
By ensuring that your team's process for assessing training requests is aligned to both your L&D strategy and the business needs that will drive your organization's success, L&D can position itself as a group that provides invaluable consultation and support, and contributes to bottom line success.

To enable the process outlined above, you need a standardized approach to training request intake that will provide you with the information you need to make your strategic assessment.

Executing Against Your Assessment Scoreboard -Top Tips



01 It is important to note that while a project which meets 4/4 of your criteria should likely be prioritized, a project that meets 1/4 should not be immediately dismissed. That is because at times the weight on one quadrant could be so strong that it supersedes other criteria. For example, your roject may only meet "high stakeholder commitment/ motivation", but if it is your CEO who is the stakeholder in question, it is likely that you will move forward.



02 Make your scorecard transparent! It will help you explain to your stakeholders why their request has been prioritized or de-prioritized.

Creating a Standarized Approach to Training Requests

Before implementing a new training intake process, consider the following:

Consider Who Should Be Able to Submit Training Requests.

Will you be taking requests from all employees? Or should employees discuss the item with their front-line managers who can then submit the formal request?

Choose One Location Where Employees Can Submit Requests.

Moving away from informal processes such as emails and in-person conversations will ensure consistency in how requests are formatted and submitted. The best place may be through a link on your company intranet or through a training intake platform.

Carefully Select What Information You Collect on a Training Request.

Consider all the information that you usually collect over email communication or during in-person meetings with the requester, only to realize that training is not required or already exists. A significant amount of time can be saved by carefully framing questions on your training request form that will help you to quickly reject requests or direct employees to existing resources.

Centralize Request Prioritization.

Place the management and prioritization of training requests in the hands of one or two people on the L&D team. That way nothing gets overlooked and it's more likely that a standardized approach will be taken.

Standardize the Prioritization Process.

Utilize a scorecard (like the example above) to ensure that the requests most critical to business success are being prioritized.

Selecting Your Training Request Form Questions

Adopting a standardized approach to training request management begins with creating a request form that can be used across the organization.Capturing the right information on your request form allows you to:

- **Speed up the prioritization process once the request is submitted**
- **Save time on meetings and follow-up discussions**
- **Transition smoothly into course design if the request is accepted**
- **Capture data on your training intake for analytics and insights**

So what information should you be capturing in order to quickly prioritize requests? And how should the form be structured?

" Our request intake is manual, so it just comes in through email or face-to-face. You track it in a spreadsheet to keep track of all."

- Samual,
L&D Manager -

Save time and capture all the information you need with this free downloadable training request template!

Download Template

Step 01 The Requester's Details

Regardless of whether all employees or only management can submit training requests, it's important to capture basic details such as:

- Name
- Title
- Department
- Location
- Email Address
- Line Manager

This will also allow you to quickly identify requests from senior or executive level management that are likely of high strategic importance.

Step 2 - The Training Details

In the next section of the form, you should pose questions that will give you insight into the type of training required. This information will give you an indication of the resources that will be needed to fulfill the request. Examples of questions in this section include:

Question	Guidance [Answer guidance helps the requestor to provide well-rounded answers.]
What specific situation, challenge or need is prompting this request	[Describe the scenario where the lack of this training has caused an issue.]
Type of training required	[Description of the topics and skills for which you require training.]
Preferred format for training	[Online, instructor-led, 1:1, mentoring, etc.]
Who is the training for?	[Individual employee, whole department, etc.]
Does this training already exist in any format?	[Yes, No, learned informally on the job, instructor-led course, etc.]
Have you or your department taken any other actions to learn these skills?	[Briefly describe other actions taken.]
Do you have existing materials or resources that can be used as content for this training?	[Briefly describe any existing resources.]

Step 3 - Capturing the Potential Business Impact

This is the section that will allow you to quickly prioritize training requests of high strategic value to the organization. The questions are structured to capture the potential business impact of the proposed training, which will allow you to prioritize the request using your scorecard. As you start to create questions for your request form, you'll see how you can capture data that frames the request in terms of strategic business importance. The questions can also provide early insight into the instructional design needs for a potential course as a result of the request.

Question	Guidance
Approximately how many learners will take the training?	[Please provide as accurate a number as possible]
What skills or competencies will be learned?	[Describe the specific hard or soft skills that learners will gain.]
Please describe the desired business outcome from this training.	[How does the training relate to corporate goals and objectives?]
What do you expect learners to be able to do after this training?	[Describe what learners will be able to do after the training that they could not do before.]
How will you measure the effectiveness of this training?	[Performance reviews, skills checks, department performance, etc.]
Does your department have budget to support the requested training solution? If so, how much?	[Please provide as accurate a number as possible]

TOP TIP: You may want to create multiple forms according to different use cases that are typical to different departments. For example: sales enablement, compliance, or safety training.

Building Your Training Request Form

Once you have a framework in place, there are several tools available to help you build it into an easy-to-use interactive form.

PDF

Fillable PDFs are a great way to create simple, interactive forms to easily distribute to your employees.
Want a pre-built one? Download a PDF training request form here!

MS WORD

If you're working with a fairly basic I.T. infrastructure, Microsoft Word can be used to create customized forms. You can easily insert interactive checkboxes and it's also one of the easiest ways to create a branded form using your company logo and other branding guidelines.

GOOGLE FORMS

Although it's not one of the more in-depth form builders out there, Google Forms is very easy to use, allows you to customize the colours and header image, and is easy to distribute through a URL.

ONLINE FORM BUILDING TOOLS

There are too many of them out there to list, but online form builders such as SurveyMonkey or Typeform may also be suitable for your request form needs.

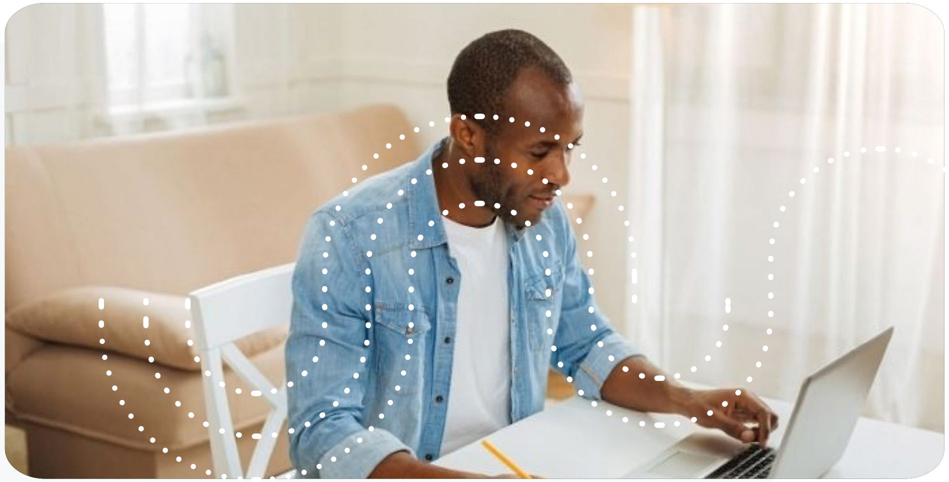
Implementing Training Intake Software

Building your form and a process for training intake can be time-consuming. It also takes significant effort on the part of L&D to encourage people to adopt a training request form in lieu of the traditional email or in-person conversations. One way to circumvent these issues is to implement training intake software.

With training intake software, L&D can

- **Create multiple branded intake forms**
- **View one single queue of training requests**
- **Quickly prioritize, accept, or reject requests**
- **Comment on individual requests for more information, avoiding email chains and long face-to-face meetings**
- **Get insights on training request data including business impact**

Employees can easily log in to the platform and submit requests through the standardized forms made available to them by L&D.



"I would love our request process to be more formal because we don't have a lot of data on them. We don't have data on how many sales training requests we get, how many I.T. requests we get. So I really have no reporting under the current process."

- Cognota, Client -

Conclusion

Proving your department's value to the organization means demonstrating your contribution to achieving strategic business goals. Prioritizing training requests accordingly (like in the scorecard provided) means you can be sure your L&D team is creating training solutions that drive performance and the realization of these goals.

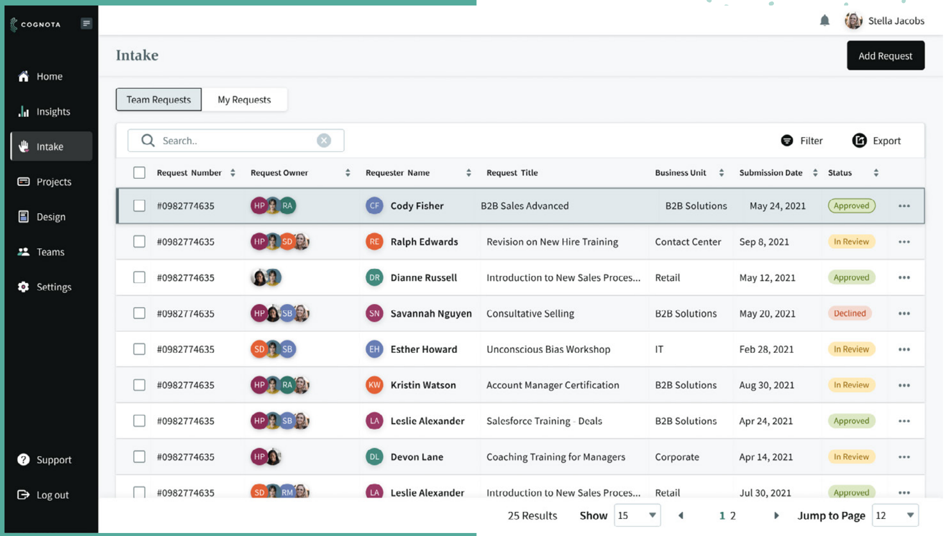
With the tools outlined in this paper, you'll soon be creating a training intake system that allows you to quickly dive into creating training with strategic value. Standardizing your approach to training intake enables easy prioritization and instant, clear visibility into the potential impact of a requested training solution.

The First and Only Learning Operations Platform for L&D Teams

Increase effectiveness by bringing the entire workflow, from intake to design, into the Cognota LearnOps platform. You'll save time, improve collaboration, and get data about team performance and learning needs across the organization, which disparate or stitched-together tools can't provide.

Try It Free

Speak With Sales



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