12th Annual
Learning Excellence and Innovation Benchmarking Study
Getting Started Guide
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ARE YOU STRATEGICALLY RELEVANT?
There are four key questions that every learning organization should ask itself – and be willing to be brutally honest when answering them – if it wants to be strategically relevant within its company.

Question # 1
Are your programs aligned around core capabilities that differentiate your organization in the marketplace?

Question # 2
Are you creating an environment for deep, diverse inquiry and collaborative problem solving?

Question # 3
Are you embedding learning into work to increase innovation and agility in a changing world?

Question # 4
Can you see evidence that your work contributes to business evolution, growth and profitability?

If you cannot answer all four of the questions above with a resounding YES! – Then you need to participate in our 12th Annual Learning Excellence and Innovation Benchmarking Study. Complete the study to find out what pieces of the strategy puzzle you need to improve in order to move your learning organization toward greater strategic relevance.

HOW DOES THIS STUDY HELP?

The Learning Excellence and Innovation Benchmarking Study provides hundreds of learning organizations the opportunity to take a step back in order to see their current systems and processes clearly and compare them to global best practices. Past participants of the Learning Excellence and Innovation Benchmarking Study report moving major initiatives forward by using benchmarking data to support:

- Identifying gaps in practices that impact effectiveness and efficiency
- Building a business case for major learning initiatives
- Funding decisions for new programs
- Incorporating results into executive level presentations
- Building executive support and advocacy

LET’S GET STARTED!

☐ STEP 1: Complete Study

Any company with a dedicated learning function/training department is a qualified study participant. (This function/department is referred to as “Learning” in this guide.) The person best suited to fill out the survey is the learning function/training department leader, although people in other roles who have strategic knowledge of the learning operations are also able to complete the survey.

A. Register Online at corpu.com

B. Complete the 4-Part Study (each part takes approximately 15 minutes) and does not need to be done all at the same time. You can choose to do one part at a time.
STEP 2: Analyze Results

You can view your performance on the 12th Annual Learning Excellence and Innovation Benchmarking Study in three ways: as an Effective and Efficiency Index (EEI), by quadrant, and/or by each individual question. To view any or all of these results, just go to CorpU’s Online Analytic tool and click on the appropriate tab.

A. Review Your CorpU Effectiveness & Efficiency Index (Compare your overall effectiveness and efficiency to hundreds of organizations)

Based on over 13 years of best practice research, CorpU has established a set of best practice processes and methods that, if adopted, achieve two critical business impacts: Effectiveness (alignment and measurement) and Efficiency (organization and execution). Every question in this study is tied to one of these two primary impacts, and the resulting scores are plotted on the Effective axis (aligned with business strategy plus measurable impact) and the Efficient axis (optimal infrastructure plus cost effective delivery).

B. View Your Ranking in 12 Critical Dimensions of Learning Excellence

Drawing from over 13 years of research into what actually drives learning excellence, CorpU has identified the most important characteristics of the successful learning organization: 12 operational skill sets that collectively enable a learning function to effectively Align, Organize, Measure, and Execute (the four quadrants). The goal of this model is simple: to identify those areas that if done in a consistently excellent manner, will improve learning in order to improve business profitability (see figure).
C. Download Hundreds of Charts and Graphs of Your Results (To illustrate key points to your management team in PowerPoint, Word, or other presentation tools).

**STEP 3: Plan for Action**

Business plans are more credible and successful when built on a foundation of facts, data, and benchmarking combined with insight from the most current academic research and business thinking. The 12th Annual Learning Excellence and Innovation Benchmarking Study helps you achieve this in the final step, “Developing Your Plan for Action.”

- **Review your benchmarking data** to determine opportunities for improvement. Carefully review each of the 12 Dimensions and see where you are a Top Quartile performer and where your practices could improve.
- **Read the research resources** designed to help expand your thinking, understand industry trends, and guide your planning.
- **Schedule your Expert Data Review.** If you are a CorpU member, you are entitled to have a CorpU benchmarking expert review your study and help better inform your plan. Call us at 212-213-2828 or email members@corpu.com when you complete the study and schedule a review!
- **Develop your Plan for Action**, informed by facts, data, benchmarking, and insight from the academic and business world.
APPENDIX A

Glossary of Terms

Advisory Board refers to a committee comprised of business leaders who provide direction and support to the Learning function but do not oversee nor have management authority over those functions.

Annual Report refers to any publication, which summarizes business results for the prior year, including those for all of the business or the Learning function, as the case may be.

Business Unit refers to a portion of the organization that has a distinct profit and loss statement and has functions unique to that unit including a subsidiary of a larger organization.

Function refers to departments such as sales, marketing, finance etc.

Governing Board refers to a committee that oversees and has management authority of Learning performance. The majority of members do not work in the Learning function.

Kirkpatrick or Level 1, 2, 3, 4 refers to a framework of learning measurement developed by Donald Kirkpatrick. For more information, on Kirkpatrick’s Four Level Model you may go to wikipedia.org.

Learning refers to the department(s) that focuses on employee development and activities within the organization.

Operating Plan or Annual Plan refers to the Learning estimate of activities and outcomes for a finite time usually one year or less.

Organization refers to the highest-level corporate entity the Learning functions serve.

Performance Consulting refers to a methodology that focuses on identifying performance problems and their root causes to determine the best solution to resolve it.

Phillips’ Return on Investment (ROI) Model refers to a framework for enhanced measurement of learning investments developed by Jack Phillips. For more information, on Philips ROI Model you may go to wikipedia.org.

Strategic plan refers to any plan the activities and outcomes of which occur over a period of greater than one year and focus on major desired business objectives.

Technical refers to specific trades and knowledge required for those trades within a function.

Web 2.0 refers to a new generation of Internet technologies that enables social networking to create virtual communication and collaboration environment.

You refers to the Learning function as a whole and not you individually.
APPENDIX B

What Are the Survey Questions Like?

The 12th Annual Learning Excellence and Innovation Benchmarking Study questions are written to target practices within 12 dimensions of Learning. We group these practices into four areas of focus: Align, Organize, Execute, and Measure. Below is a collection of sample questions taken directly from the survey and organized by quadrant.

Sample questions:

Align

- Which of the following best describes the process the learning function uses to understand the workforce skill requirements needed by the organization to execute its business strategy?

- Which of the following best describes when and how the learning leadership team participates in the strategic planning process for the enterprise?

- Which of the following best describes how the learning function currently identifies an organization’s performance problem?

Organize

- Which of the following make up your current learning technology architecture and software systems?

- Which of the following best describes the governance of the learning function across the enterprise?

- Which of the following best describes how the annual marketing and communication plan for the learning function is created?

Execute

- Which of the following best describe(s) the method(s) the learning function uses to develop its curriculum plan?

- Which of the following describe(s) how the learning function measures its effectiveness in executing its function?

- Which of the following best describes the process the learning function uses to decide when to outsource learning activities to partners (i.e., third party providers)?

Measure

- Which of the following methods does the learning function use to measure employees’ reactions to its programs/initiatives?

- Which of the following describe(s) the methods the learning function uses to measure the effectiveness of its programs/initiatives against business metrics (for a majority of programs)?

- Which of the following describe(s) the process that is used to encourage business leader participation in employee development and learning programs/initiatives?
APPENDIX C
Frequently Asked Questions

For your convenience, we have included several answers to questions that might come to your mind as you complete the CorpU 12th Annual Learning Excellence and Innovation Benchmarking Study.

Do I have to complete the entire survey? You do not have to complete the entire survey all at once; you can work on each quadrant at a time and can access your performance results for each part by completing at least 80% of that specific quadrant.

Is there a fee for participating in the Annual Benchmarking Study? No, there is no fee for participating. This study is free for both CorpU members and non-members.

Can I participate if I am not available to start it for a few weeks? We will keep it open long enough so that vacations, business trips, etc. will not be a barrier to completing the study. However, if you can, we recommend that you start now in order to get the most value out of the process to utilize for your 2014 strategic planning.

What are the 12 Dimensions (12-D) and 4 Quadrants? Drawing from more than 14 years of data on more than 800 companies, as well as over 13 years of research into what actually drives learning excellence, CorpU has identified some of the most important characteristics of the successful learning organization: 12 operational skill sets that collectively enable a learning function to effectively Align, Organize, Measure, and Execute (the four quadrants). The goal of this model is simple: to identify those areas that, if done in a consistently excellent manner, improve learning in order to improve business profitability.

What is the Effectiveness and Efficiency Index (EEI)? Based on over 14 years of best practice research, CorpU has established a set of best practice processes and methods that, if adopted, achieve two critical business impacts: Effectiveness (alignment and measurement) and Efficiency (organization and execution). Every question in this study is tied to one of these two primary impacts, and the resulting scores are plotted on the Effective axis (Aligned with Business Strategy Plus Measureable Impact) and the Efficient axis (Optimal Infrastructure Plus Cost Effective Delivery). The score is placed on a grid of four quadrants, and informs the participant the type of partnership with senior executives their score indicates:
   1. Traditional Training Partner
   2. Tactical Training Partner
   3. Valued Business Partner
   4. Strategic Business Partner

How will my company benefit? Early research on the connection between the EEI Index score and profitability among public companies is promising. Initial results indicate that companies with a higher EEI Index score perform better financially, and this implies that there is a positive correlation between Effective and Efficient learning processes and financial performance. With higher EEI scores reflecting greater profitability, organizations participating in the 12th Annual Benchmarking Study will benefit by being able to identify which specific dimensions of Effectiveness and Efficiency they need to improve, and then planning solutions to make those improvements. Steady EEI improvement should therefore reflect financial growth.

Can I go back and make changes to questions I have already answered? Yes. All you need to do is access your study through the Analytics page, find the question response(s) you would like to change, and then make the desired changes.

How long do I have access to my 12th Annual Benchmarking data? You have access to your benchmarking data indefinitely.