

Portfolio Case Study



The work behind the value

Shifting Learning from Order Taking to Strategic Business Partner

The Client or Team

The client was a large national insurance and financial services organization with a complex learning environment supporting multiple business lines, advisor-facing teams, service teams, leaders, facilitators, and operational partners.

At the time, I led a national learning and enablement team responsible for supporting onboarding, product knowledge, sales capability, systems training, compliance learning, service expectations, and change implementation. The team was operating in a period of economic and organizational change, with increasing demand from the business and growing pressure to deliver more efficiently.

The Problem

Economic and organizational changes were increasing pressure on the learning team.

Business units needed support in changing priorities, evolving roles, new products, system updates, compliance expectations, and addressing performance gaps. As demand grew, the learning team received more requests and struggled to keep up with the traditional intake model.

The challenge was that the team risked being seen as an **order-taking function**: receive the request, build the solution, deliver the training, and move on to the next priority.

That model was no longer sustainable.

The team needed to shift from reacting to individual requests to becoming a more strategic partner in business planning. This meant getting involved earlier, asking better questions, identifying common needs across business units, and recommending more efficient and higher-quality solutions.

The real issue was not only the volume of requests. It was that many requests were symptoms of a larger need. The business might ask for a course, a job aid, or a workshop, but the true need could be role clarity, process change, performance support, coaching, communication, or better measurement.

The team needed a better way to understand:

- what problem the business was trying to solve
- which audiences were impacted
- where needs overlapped across business units
- what support was truly required
- what could be combined, simplified, sequenced, or measured differently
- how to use annual planning to make better decisions before requests become urgent

The goal was not to reduce the value of the learning team. The goal was to elevate the work, from taking orders to providing strategic analysis, business recommendations, and enabling solutions that better supported development needs across the organization.

At its core, this was a change-management, operating-model, and business-partnership **challenge**: how to help a high-demand learning team move from reactive intake to strategic planning and advisory support.

She used and implemented Agile methodologies to ensure that our projects were completed efficiently, from conception to completion

My Approach

I approached this as a **strategic planning and business-partnership opportunity, not just an intake-improvement** exercise.

The team was receiving more learning requests, but the real opportunity lay in moving earlier in the business planning cycle. I wanted learning to be part of the conversation before priorities, budgets, timelines, and solutions were already decided.

I started by looking at the annual strategic planning cycle and identifying where learning and enablement could add value earlier. From there, I set up discovery meetings with key decision-makers across each division.

These conversations were intentionally positioned as planning support rather than training intake. The goal was to help leaders think through their upcoming priorities, workforce needs, capability gaps, role impacts, and change requirements before they finalized their plans.

The discovery discussions helped demonstrate the value of asking better questions at the planning stage:

- What business priorities are changing?
- Who will be impacted?
- What will people need to know, do, or apply differently?
- Where are there common needs across divisions?
- What support may be required beyond training?

- What should be planned, budgeted, measured, or sequenced differently?

After each discussion, I provided the division with a follow-up checklist of items to consider during their planning process. This gave leaders a practical tool to think more clearly about learning, training, enablement, change support, and measurement before submitting final plans and budgets.

I also scheduled follow-up sessions after their internal planning meetings were complete, but before the final budget and plan submissions were sent for executive review. This gave me the opportunity to review emerging trends, identify shared needs, and provide early recommendations on how learning could better support the business.

Over time, this shifted the relationship. Instead of being brought in after the request was already defined, I was invited into planning conversations earlier. My managers and Business Analyst were also brought into divisional planning sessions to contribute insight, identify patterns, and support decision-making in real time.

The strategy helped move the learning function from reactive intake to strategic advisory support. It allowed us to better understand business needs and to align on common priorities.

Actions and Challenges or Constraints

To support the shift from reactive intake to strategic partnership, I focused on creating practical entry points into the business planning process.

The goal was to help leaders think about learning and enablement earlier, while also giving the learning team better visibility into upcoming demand, shared needs, capacity requirements, and opportunities to support the business more efficiently.

Key actions included:

- **Mapped the annual planning cycle** to identify where learning could add value before priorities, budgets, and solutions were finalized.
- **Set up discovery meetings with key decision-makers** from each division to understand their upcoming business priorities, capability needs, workforce impacts, and change requirements.
- **Repositioned the conversation from training requests to business needs**, helping leaders think through what people needed to know, do, apply, or change to support the plan.
- **Provided each division with a planning checklist** to help them consider learning, training, enablement, change support, timelines, measurement, and resourcing before finalizing their plans.
- **Scheduled follow-up sessions after divisional planning meetings**, but before executive budget and plan submissions, so early recommendations could be made while there was still time to adjust.
- **Identified common needs across divisions** to reduce duplication, combine similar requests, and recommend more scalable solutions.
- **Brought managers and the Business Analyst into planning conversations** to provide operational, measurement, and capacity insight in real time.

- **Used planning discussions to create early visibility into demand**, helping the team better anticipate workload, prioritize resources, and prepare for upcoming business needs.
- **Shifted stakeholder expectations** by demonstrating that the learning team could provide analysis, recommendations, and planning support — not just build what was requested.

The biggest challenge was changing the relationship with the business. Many stakeholders were accustomed to presenting a specific request to the learning team after the need had already been framed. Moving earlier into the planning cycle required trust, credibility, and a clear demonstration of value.

There was also a capacity challenge. The team was already managing a heavy workload, so joining planning conversations could not feel like “one more thing.” It had to create better decisions, reduce rework, and help the team see demand earlier rather than react to it later.

Another constraint was helping the team build confidence as strategic partners. Managers and team members needed to feel prepared to ask stronger questions, challenge assumptions respectfully, and offer recommendations when the requested solution did not fully address the business need.

The work required a balance between being service-oriented and being strategic. The team still needed to be responsive to business partners, but also had to protect quality, capacity, and impact by helping the business define the right support before committing to the work.

Over time, the planning approach created a stronger partnership model. The learning team was invited into more upstream conversations, had better visibility into business priorities, and could offer recommendations before work became urgent or locked into budget plans.

Strategic leadership creating innovative ways to meet goals with limited budget while keeping staff engaged.

Outcomes

The annual planning approach helped shift the learning function from a reactive intake model to a more strategic business partnership model.

By moving earlier into the planning cycle, the team gained better visibility into business priorities before requests became urgent. This allowed us to identify shared needs across divisions, recommend more efficient solutions, plan capacity more effectively, and support higher-quality learning and enablement decisions.

Key outcomes included:

- **Learning was invited to participate in divisional planning sessions earlier**, allowing the team to contribute before budgets, timelines, and solutions were finalized.
- **Managers and the Business Analyst became part of planning conversations**, providing real-time input on feasibility, measurement, capacity, and solution options.

- **Annual learning demand became more visible**, helping the team anticipate upcoming work rather than react to one-off requests throughout the year.
- **Urgent or unplanned requests were reduced by 40%** after learning became part of annual planning conversations.
- **80% of programs or initiatives were combined, sequenced, or simplified** based on cross-division planning insights.
- **Stakeholder satisfaction / NPS with the learning team's planning support and recommendations increased by 30%.**
- **Workforce planning improved**, giving the training team better visibility into upcoming demand, resource needs, delivery timing, and capacity requirements.
- **The team was able to meet and surpass demand more effectively** because work was planned, sequenced, and resourced with greater intention.
- **Quality improved because the team had more time and capacity to do the work well**, instead of constantly reacting to urgent requests or late-stage changes.
- **Common needs across divisions were identified earlier**, creating opportunities to reduce duplication, scale solutions, and improve consistency.
- **Prioritization improved**, with learning requests assessed against business value, audience impact, timing, capacity, and strategic alignment.
- **Business partners received stronger recommendations**, including when training was appropriate and when the need required communication, coaching, performance support, process clarification, or change enablement.

The broader outcome was a stronger operating rhythm between the learning function and the business. Planning conversations became less about taking requests and more about understanding priorities, diagnosing needs, and making informed recommendations.

From the training team's perspective, this was a meaningful shift. The team had more visibility, better context, and stronger workforce planning to support the work ahead. This helped reduce the pressure of constant reactive intake and created more space for thoughtful design, quality delivery, and stronger collaboration across roles.

At the business level, this led to better use of learning resources, stronger alignment with priorities, and more thoughtful planning for capability development, change support, and performance outcomes.

In practical terms, this work helped elevate the learning function from order-taking to strategic enablement — reducing urgent intake by 40%, increasing stakeholder satisfaction by 30%, helping 80% of programs or initiatives become more effectively combined, sequenced, or simplified, and giving the team the capacity to deliver higher-quality work with greater confidence and focus.