

Portfolio Case Study



The work behind the value

The Client or Team

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

At the time, I led the Sales Distribution Enablement and Learning Division. Our team supported the development and readiness of Financial Advisors and their staff through onboarding, product knowledge, sales capability, systems training, compliance learning, service expectations, and change implementation.

As the learning portfolio continued to grow, it became clear that the team needed better visibility into what was working, what needed attention, and where limited resources should be focused.

The Problem

Program maintenance timelines were too long, and learning decisions were not always supported by the right data.

The team was managing a large portfolio of programs across multiple business lines. Requests for updates, improvements, and new learning support were constant. Some were urgent, some were important, and some were connected to legacy program cycles that had not been fully reviewed against current business needs.

The challenge was that decisions were often influenced by anecdotal feedback, urgent requests, or historical assumptions rather than clear insight into learner experience, program performance, delivery capacity, maintenance needs, and business impact.

There was also a bigger opportunity. Learning data was available through systems such as the LMS and LXP, but it was not yet being used consistently to support faster decisions or stronger alignment with the business. There was also potential to better connect learning activity to other performance indicators, including HRIS data, CRM activity, revenue dashboards, and marketing campaign performance.

The organization did not need additional reporting for its own sake. It needed practical insight that could help answer better questions:

- Where are learners struggling?
- Which programs need attention first?
- What is creating friction in the learner experience?
- Where are we overinvesting or underinvesting?
- What does the business need to see to make better decisions?
- How does learning activity connect to performance, sales activity, campaign adoption, and operational priorities?

At its core, this was a **learning analytics, prioritization, and change management challenge**: how to use data to improve decisions, support the learner experience, and help the team become more agile.

“She has the ability to see the full picture for her clients from project conception to implementation and evaluation/improvements.”

My Approach

I approached this as both a **data strategy and business alignment opportunity**, not just a reporting problem.

The goal was not to create more dashboards. It was to build a better system of measures that could help the learning function understand what was happening, make better decisions, and show how learning activities connected to performance.

A key part of my approach was leveraging a business analyst's skills. I wanted the work to go beyond defining the problem. We needed to identify the right data points, understand which systems could provide them, and determine how the information could be connected in a practical and useful way.

This included looking at the potential of:

- LMS and LXP data
- HRIS data
- CRM activity
- revenue dashboards
- marketing campaign data
- Power BI reporting
- automated reporting opportunities

The focus was to create the ingredients for a more connected measurement system — one that could align **objectives, learning activities, learner experience, performance indicators, and business outcomes**.

I used a measurement-and-evaluation lens to help the team move beyond activity reporting. Completion rates, attendance, and satisfaction scores were useful, but they were only part of the story. The stronger opportunity was to understand how learning activity supported readiness, behaviour change, sales activity, campaign adoption, operational efficiency, and business performance.

The questions became more practical:

- What are we trying to improve?
- What learning activity supports that outcome?
- What data tells us whether people are engaging?
- What data tells us whether behaviour is changing?
- What business measures help us understand impact?
- Where can automation reduce manual reporting and improve decision speed?

The human lens mattered here as well. Data could not feel like extra administrative work or a judgment tool. It needed to help people do their work better. I wanted leaders, facilitators, designers, and business partners to see data as a way to focus effort, spot patterns, reduce rework, and make stronger decisions.

The purpose was simple: use the right data, from the right systems, to help the learning function become more agile, more aligned to the business, and more confident in where to focus time and resources.

Challenges or Constraints

The work started with the data and systems we already had. Rather than waiting for a perfect analytics environment, I focused on what could be used quickly and practically.

I established learning analytics roles and worked with LMS and LXP data to generate more actionable insight into learner experience, program usage, learning outcomes, and operational planning. I also explored how those insights could be better aligned with HRIS, CRM, revenue, and marketing campaign data to create a more complete view of performance.

A key action was identifying the right data points. This meant looking at what we already tracked, what leaders were asking for, what the team needed to manage the work, and what data could help connect learning to business priorities.

The work included:

- identifying available learning and performance data sources
- reviewing LMS and LXP reporting capability
- exploring Power BI and automation opportunities
- defining practical data points connected to objectives, activities, learner experience, and performance
- using analytics to support program health reviews
- connecting learner feedback to maintenance priorities
- improving visibility into program usage and delivery demand
- using insight to help prioritize updates and resource allocation
- exploring alignment between learning activity, CRM activity, revenue dashboards, and campaign performance

One of the biggest challenges was changing the team's relationship with data. Data could not be seen as more reporting work or as a way to judge people. It needed to become a practical support for better decisions.

To help with that shift, I connected analytics to the everyday pain points the team was already experiencing:

- maintenance delays
- competing business requests
- unclear prioritization
- learner feedback that was hard to interpret
- leader questions that needed better evidence
- limited team capacity
- pressure to improve programs while continuing to deliver them

There were also real-time and resource constraints. The team could not stop delivering work to build a perfect analytics system. The approach had to be phased, practical, and useful quickly.

The work was not about creating a complex measurement model that no one would use. It was about building insight into the workflow so the team could make better decisions, respond faster, and improve programs with more confidence.

"If you're looking for a learning consultant who combines innovation, strategic thinking, and a relentless focus on impact, I can't recommend Carrie highly enough."

Outcomes

The learning analytics function helped the team make better decisions with better evidence.

One of the most important outcomes was the development of a dedicated capability for this work. The function grew to **three Learning Analyst roles**, creating focused support for measurement strategy, reporting, performance analysis, program evaluation, and business-aligned learning decisions.

These roles became involved earlier in the learning process. They supported needs analysis by helping to identify the right data points, reviewing available performance information, and recommending ways to measure learning outcomes more consistently. This helped the team ask stronger questions at the start of the work, such as: What are we trying to improve? What information do we already have? And what evidence will help us know if the learning is working?

The work also strengthened our ability to support **Kirkpatrick Level 3 evaluation**, with more focus on behaviour change, skill application, and performance in the role. By defining lead and lag measures across LMS, HRIS, CRM, revenue dashboards, and marketing campaign data, the team could better understand how learning activity connected to advisor readiness, proficiency, campaign adoption, and business performance.

This created a stronger system of measures that connected learning objectives, learning activities, learner experience, role performance, and business outcomes.

Key outcomes included:

- **Program maintenance timelines were reduced from approximately 3 months to 2 weeks**, enabling the team to respond more quickly to learner feedback, product updates, business changes, and performance needs.
- **Time to proficiency improved by approximately 20%** by using learning analytics to identify performance gaps, prioritize program updates, and align learning activities to the skills advisors needed to apply in the role.
- **Three Learning Analyst roles were established**, giving the function dedicated capacity to support measurement, evaluation, performance analysis, and business-aligned reporting.
- **Learning analytics became part of needs analysis and program planning**, helping the team define success measures earlier in the process.

The analytics capability also helped create more meaningful learning experiences in the flow of work. The team could measure proficiency, track skill progression, and use certification levels to confirm observable application of skills.

This was especially valuable during key product campaigns and the integration of Wealth into the broader distribution model. By combining learning data with CRM activity, advisor performance, marketing campaign data, and revenue indicators, leaders had a clearer view of what was happening in the field.

That insight helped identify where performance gaps were connected to knowledge, confidence, tools, process, compensation, regional differences, marketing activity, or other operating conditions. It also helped the team respond more quickly with the right type of support, including program updates, targeted reinforcement, facilitator support, leader coaching, or business process clarification.

In practical terms, this work created a learning analytics capability that connected learning activity to behaviour, proficiency, campaign performance, operational conditions, and business outcomes. It gave the team better insight, gave leaders stronger evidence, and positioned learning as a more strategic partner in improving performance.

The real value was better decision-making, faster action, and a clearer line of sight between learning, advisor performance, and business results.