

# LEARNING STRATEGY CHECKLIST

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Your checklist

To evaluate your learning strategies' readiness for

## RESULTS




LEGACY  
LEARNING  
CONSULTING



**This checklist** will prompt you to evaluate each **necessary** component of your learning strategy to help you determine its readiness to **deliver measurable results** for your organization.

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# STRATEGY STATEMENT

**Which of these steps have you taken to draft your strategy statement?**

- We have a clearly defined strategy statement that articulates the organizational drivers and anticipated goals of our learning strategy
- We have involved leadership and other stakeholders in the development of the strategy statement.
- We have communicated the Strategy Statement with all stakeholders

## Here's an example of a learning strategy statement

*We are navigating the pressures of integrating AI-powered tools into our workflows, adapting to increasingly personalized customer demands, and staying ahead of aggressive new competitors in our market. This learning strategy is intended to outline approaches and learning programs to prepare employee to incorporate AI tools into their workflow, minimize the risks of AI and provide exceptional service to our customers.*



### MEASUREMENT

Statement explains the problem and our reason for leveraging learning as a solution.

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# LEARNER PERSONAS

**Which of these steps have you taken to draft your learner personas?**

- We have interviewed leadership, other stakeholders and learners to determine varying perspectives on learning needs
- Our learner personas include the following:
  - career history
  - educational background
  - motivations for learning
  - obstacles to learning
  - preferred formats
  - preferred approaches
  - skill gaps
  - other criteria you have learned about your learners.

[See an example here](#)



## MEASUREMENT

Learner personas provides a clear picture of who the actual learners are.

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# PROGRAM OUTCOMES

**Which of these steps have you taken to establish your program's learning outcomes?**

- We have written 5-15 learning outcomes that we expect learners to be able to do when they are finished with the learning program (note these outcomes are at the program level, you'll draft module/course outcomes when you get to that phase)
- We have involved leadership, stakeholders and learners in the outcome development process

## **Here are some example program outcomes**

- Learners will be able to utilize new AI-powered tools and technologies,
- Learners will be able to integrate role-specific AI-powered tools and technologies into their workflows to enhance productivity, streamline decision-making, and drive measurable business outcomes.



### **MEASUREMENT**

The list of outcome are correct (are they the behaviors we want to see) and complete (if all of these behaviors are demonstrated, we consider the program a success.

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# LEARNING APPROACH

**Which of these steps have you taken to decide on the learning approach for your program?**

- We have identified the various learning formats that will be part of the program
- We have gained perspectives from leadership, stakeholders and learners to ensure the various approaches align with the varying goals of each group
- We have developed a plan and design criteria for each element of the program

**Here is the start of a learning approach as an example**

- eLearning format for information delivery, demo AI tools and some provide opportunities for practice activities
- Team Presentation for learners to demonstrate the use of new AI-powered tool



## MEASUREMENT

Approach Plan includes a variety of formats and creates a cohesive learner journey.



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# SUCCESS METRICS

Which of these steps have you taken to determine how you measure success of learning initiatives?

- We have identified the criteria we will measure to determine success
- We have developed tools and processes to measure the metrics
- We have established a reporting schedule for the metrics

Here is the start of a metrics plan as an example

- Measure the number of new AI tools implemented
- Evaluate current productivity metrics to determine if any changes occur
- Report monthly on metric findings

	<b>MEASUREMENT</b>	The metrics measure program learning outcomes and any data related to the organizational goal in the strategy statement.
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# LEARNING STRATEGY SUMMARY CHECKLIST

**Be sure to include the following:**



Strategy Statement



Learning Personas



Program Learning Outcomes



Learning Approach



Success Metrics





# Need additional help developing or implementing your learning strategy?

Let's talk about how we can help solve  
your toughest organizational challenges.

**SCHEDULE A CONSULTATION**