

**BUSINESS CASE FOR INVESTING IN  
LEARNING & DEVELOPMENT assignment for**

Master of Science

Strategic Human Resources

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## **Introduction & Summary**

A learning organization is one that leverages knowledge transfer to prioritize the growth of its people both professionally and personally, integrating learning into its overall culture while simultaneously driving business alignment with such learning and growth for its own overall benefit. Characteristics of a learning organization that should be met include opportunities for continuous learning; learning that allows individuals to reach their personal and professional goals; links between individual performance and organizational performance; an allowance for inquiry and dialogue, providing safe and open opportunities for people to share and take risks; adoption of energy and renewal through tension and change; and continuous awareness of and interaction with the organizational environment (Smith 2007). These characteristics are important to an organization's success because they provide crucial alignment between an organization and its people, and ultimately, to its overall success. "In our view, organizational learning is just a means to achieve strategic objectives. But creating a learning organization is also a goal since the ability permanently and collectively to learn is a necessary precondition for thriving in the new context" (Smith 2007). Additionally, these characteristics are integral to ensuring that learning never stops across an organization and within an environment of shared vision and values.

A performance gap at Sunrun includes new hire training and onboarding for our company-wide productivity suite, Google Workspace, a training initiative that Sunrun's L&D team has named Sunrun IT 101. Currently, new Sunrun employees who come from companies that use other productivity suites such as Microsoft Office (Word, Excel, and PowerPoint), Apple's iWork (Pages, Numbers, and Keynote), or Linux-based LibreOffice (Writer, Calc, and

Impress) good mention of the alternative knowledge folks bring to Sunrun often lose time early in their onboarding process because they're unfamiliar with Google Workspace and are required to learn it at their own pace. This loss of time limits New Hire Time to Productivity for these employees, for which the industry standard is 90 days. The desired state involves developing new hire training for all new Sunrun employees to complete during their onboarding process that provides equitable access to training, regardless of skill level or background, for Google Workspace. Sunrun's mission is "to create a planet run by the sun. This means that everyone, from solar installers and salespeople to our CEO, shows up to work because they are driven by passion and purpose" (Investor Relations 2023). Driving passion and purpose for Sunrun employees begins with a vision for the future to equip each employee with the tools they need for productivity and success from their first day on the job. The proposed Sunrun IT 101 course is a perfect example of an initiative that will drive such passion and purpose.

### **Benefits to the Organization**

Building support for L&D initiatives such as the proposed Sunrun IT 101 course and marketing the value of these efforts are important elements for the success of any plan for improvement, as well as key factors that can influence the overall outcome. Therefore, the value of the IT 101 learning function at Sunrun must include three key elements: planning, communication, and follow-up. "Develop a strategic plan to identify, define, and justify where the organization is headed, why it is going there, and how it will add value for all stakeholders. [Then,] obtain performance data via a needs assessment, where needs are the gaps in results, not the gaps in means or resources" (Kaufman 2016). Before any L&D team can meet strategic

needs, it must be strategic in identifying the most impactful needs to be met. A needs assessment is likely the most effective tool to determine the quickest, most effective 'wins' when closing gaps. Kaufman (2016) indicates clearly that these gaps are gaps in results, not gaps in efforts or tools. "Organizational development teams need to communicate proactively to engage employees, remind team members to complete mandatory courses, and persuade those who would benefit most to make time for additional sessions" (Panopto 2015). Any successful new product must be effectively marketed to have a successful launch. L&D teams must prioritize a successful marketing and communication campaign for training efforts and initiatives to ensure success. "Make follow-up visits to participants and supervisors to learn success stories following training" (Barbazette 2008). The L&D team at Sunrun lives by the motto, 'Data or it didn't happen'. Follow-up visits to participants and supervisors, as Barbazette suggests, can yield invaluable data that not only sheds light on immediate needs met by training initiatives but also future opportunities to close gaps identified in the initial needs assessment implemented in the planning stages.

Moreover, the 70:20:10 Framework "is a learning and development reference model which captures the three ways adults learn at work - through experience, socially and formally" (2018). These questions may help to capture the idea of a performance consulting approach appropriate to close the identified performance gap for new employees at Sunrun. Asking the following questions driven by systems thinking from the beginning may help to determine the root cause and potential factors that may influence the outcome of the initiative:

- a. Is lack of knowledge of Google Workspace a contributing factor?
- b. Is lack of skill within Google Workspace a contributing factor?

- c. Is lack of motivation within Google Workspace a contributing factor?
- d. Is an unsupportive environment around the use of Google Workspace a contributing factor?

These questions should help to provide evidence of a systems-thinking mindset in approaching the identified performance problem for new employees, and they may also help to develop an informed solution by pointing directly to the factors that can influence the outcome.

### **Analysis for Support**

When considering the potential of Sunrun's IT 101 course for new employees, it is paramount to recognize first that the cost of doing nothing may result in failure to realize actual productivity for new employees at Sunrun. As a result, the attrition rate may increase, new employees may mistakenly put the company's sensitive data at risk, or the business may lose money because of the new employee's lack of acumen with Google Workspace. For example, employees who start their first day without knowledge of how to access a virtual meeting via Google Meet, how to respond to a supervisor's email via Gmail, or how to ask a clarifying question via Google Chat may be forced to waste valuable time waiting for help instead of diving into the work at the first opportunity.

Moreover, a lack of systems thinking could decrease the value of a training department or program within an organization when a company fails to attract and retain top talent. This example points to Senge's ninth system archetype 'Growth and Underinvestment', which is defined as "the trap where investing does not seem necessary because all is well at the moment. Not investing today, however, might lead to a lost opportunity for growth in the future because of a lack of skills or capacity" (MudaMasters 2014). An organization that fails to

invest in the growth of its top talent, those employees could potentially find other companies who are fully invested in such employee growth and 'jump ship'. A loss of top talent could then point to the training department or program within an organization as the root cause when, in reality, the root cause lies in leadership decisions (or lack thereof). "Organizations that develop learning and development (L&D) plans for their employees, with a focus on system thinking training, benefit not only from having system thinkers in the workplace but also from the added perk of attracting, retaining, and motivating top talent who value continuous learning" (Crawley 2023). Clearly, a systems thinking approach could improve the outcome with a clearer focus from top leadership on investment in learning opportunities that would attract and retain top talent

### **Evaluating & Sustaining**

Results from the IT 101 initiative to close the new employee performance gap at Sunrun include new hire training and onboarding for our company-wide productivity suite, Google Workspace. The desired solution should impact all necessary skills for the successful and productive use of Google Workspace. Success will be measured via the Kirkpatrick Model, "a globally recognized method of evaluating the results of training and learning programs [that] assesses both formal and informal training methods and rates them against four levels of criteria: [Level 1] reaction, [Level 2] learning, [Level 3] behavior, and [Level 4] results" (Ardent Learning 2020). Following the required Sunrun IT 101 course for new employees, I would include a survey that included learner-centered questions. "Making questions learner-centered shifts the focus from critiquing the program to sharing a personal viewpoint" (Kirkpatrick 2015, 7). No employee wants to fail the simple tasks required of them on the first day of work, but it

happens. I would measure learner satisfaction with the formal training experience by ensuring comfortability with the line of survey questioning as well as a safe opportunity for honest, open feedback.

Next, I would recommend regular monitoring of Google Workspace use among new employees and results of manager surveys or employee reviews throughout the first 90 days. This data would help to illustrate the degree to which learners, or employees, acquired the intended knowledge, skills, and attitudes for the effective use of Google Workspace. To validate that data, I would recommend measuring to what degree new employees apply their new learning during the required Sunrun IT 101 course when they have fully assumed their new on-the-job responsibilities. Measurement of critical behaviors and required drivers will help to gauge the extent to which the required Sunrun IT 101 course changed employee behavior. Critical behaviors are defined as “specific actions that, if performed consistently on the job, will have the biggest impact on the desired results” (Kirkpatrick 2015, 3). Since the desired results for Sunrun’s IT 101 course include knowledge, skills, and attitudes for the effective use of Google Workspace, the critical behaviors to be observed include the effective use of the tools that are taught in the required training. Required drivers are defined as “processes and systems that reinforce, monitor, encourage, and reward performance of critical behaviors on the job” (Kirkpatrick 2015, 3). Required drivers recommended to reinforce the regular and efficient use of Google Workspace applications include processes and systems driven and measured by employee communication, engagement, and productivity.

Finally, evaluating the results of Sunrun’s IT 101 course for new employees will require measurement of leading indicators. Leading indicators are identified as “short-term

observations and measurements that suggest that critical behaviors are on track to create a positive impact on the desired results” (Kirkpatrick 2015, 2). Leading indicators for Sunrun’s IT 101 course for new employees would include an increase in the innovative use of Google Workspace applications for productivity, communication, and engagement. Examples of such innovative use may include employee-driven email campaigns via Gmail, virtual team-building exercises via Google Meet, and efficient project management via Google Chat. Ok and for the final paper offer more details on how you will apply these four levels.



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