CASE STUDY.

Sandra The Oracle Ltd is a company that specializes in providing cloud hosted data analytics. With the advent of Covid which increased the need for technology to over 50% for some organizations and even as high as 80% for some other organizations.

The management team have just concluded their management retreat and the following decision was taken; the urgent need to rebuild the organization's online platform which was presently using a technology that had been in place for over five years though it had been meeting their customers' needs it is no longer meeting the needs of their customers and so it is top priority for the company.

The Head, Learning and Development has decided to meet with the leadership team to discuss how learning and development can support the project, which is currently the topmost priority for the organization. The Head, Learning and Development wants to create a learning and development strategy to support this top priority.

Sarah, who is The Head, Learning and Development arranges a two-hour meeting with the leadership team (LT) consisting of the CEO, Finance Director, Head of IT, Sales Director, Head of Marketing and HR Director. Her aim is to go through the six essential steps for creating an L&D strategy with them to gather information which will form the basis of the learning and development strategy.

Sarah meets with the LT in a nice spacious meeting room with a whiteboard and lots of flipchart paper and pens. Since there are six of them, she splits them into two separate groups of three sitting on different tables as follows:

1. Table 1 – CEO, Head of IT and Head of Marketing.
2. Table 2 – Finance Director, Sales Director, and HR Director.

She introduces the aim of the session as, *gathering information that will allow the learning and development team to create a learning and development strategy*. Sarah reiterates what a learning and development strategy is and its benefits to the organization (she had already done this at a previous meeting and in an email). She also appreciates them for giving her two hours of their time despite their very busy schedules.

She tells them that to gather the right information they will all go through six questions which will allow her to create a first version of the strategy within two weeks. Some key lessons can be learnt from Sarah that are necessary to create an effective learning and development strategy, and they are:

- Start with the senior leadership team. Engage them first and sell them the benefits of having a learning and development strategy and how it will help them achieve their organizational objectives.
- Try and get information from them as a group so that that they all agree.
- Give them a specific time to release version 1.0 of the strategy

Sarah writes up the first question for them to discuss which is:

- ***1. What are the most important priorities the organization wants to achieve this year?***

Each group has flipchart and paper. They have 10 minutes to answer the question. After 10 minutes each table presents their answers. There are a few differences and Sarah gives them another 10 minutes to discuss and come up with one list. Sarah rewrites all the priorities identified as business goals as SMART objectives. Following is an example of the priority.

The priority

To rebuild our online analytics delivery platform with more current and better technology.

Rewritten as a business goal

Specific: To rebuild our cloud data hosting platform with current and better technology.

Measurable: 90 percent of customers can use the platform successfully without problems four months after release.

Achievable: Given the resources we have we can build the platform within the specified time.

Relevant: This goal is relevant to our overall vision as an organization.

Timebound: To release version 1.0 on the first day of the final business quarter of the business year.

By defining the priority as a business goal, the measurement criteria to determine its success is clear.

Next Sarah gives the groups the second question to discuss for ten minutes.

- ***2. What actions does the organization need to take to successfully achieve this objective?***

Sarah explains that the purpose of this question is to identify the key actions that will be taken to achieve the priority identified through question one. In other words what strategy will the organization implement to achieve the priority. Sarah tells them that she is looking for clear actions or steps.

After ten minutes Sarah stops them and just as she did in question one asks them to align their notes. For the priority discussed previously the LT came up with:

- Design prototype and specifications for the new platform.
- Decide what technology to use.
- Adopt an agile project management framework.
- Ensure we have the right staff with the right skills and behaviour/attitude.
- Develop and test the platform using the lean methodology.
- Release version 1.0 of the platform with minimal bugs.

Next Sarah asks them question three:

- ***3. What capabilities does the organization need to successfully implement those actions they listed?***

As in the previous two questions she gives them 10 minutes to discuss and write down their answers. She stops them after 10 minutes and allows them to align their answers. These are the aligned answers Sarah writes out on flipchart paper:

- Agile project management
- Software prototyping
- Able to use lean software methodology
- Back-end Web development with Python related technologies
- Front-end web development with JavaScript related technologies
- Effective software testing
- Servant Leadership
- Leadership and management skills for managing projects

Now that questions two and three have been answered, Sarah prepares for question four.

Sarah told them that though there are six questions that need to be answered, she will only ask them one more question. The last two questions will be answered by the learning and development team and the answers will be shown to them to review. The fourth and last question for them to answer is:

- ***4. What must people know, be able to do, and how to do for the organization to have those capabilities?***

Sarah changes the way she gets them to answer this question. Instead of them working in small groups, she puts three sheets of flipchart paper on the wall and titles one skills, the other knowledge, and the third behaviours. She asks them about the skills, knowledge, and behaviour required for each capability identified in the answers to the previous question. **So, what people need to know refers to knowledge, what people need to be able to do are the skills, and how they should be able to do this are behaviours.**

Here are the skills, knowledge, and behaviours identified:

Skills

- Manage projects using the agile project management methodology.
- Effective communication skills
- Team building skills
- People skills
- Leadership skills
- Effective Management skills
- Design software prototyping for platform
- Apply the lean methodology to design and develop software
- Use the Python and Django framework and MySQL to develop backend
- Use JavaScript, Bootstrap, and jQuery to develop frontend
- Use unit testing to test software

Knowledge

- Appropriate theoretical knowledge in all the technological areas mentioned under skills.
- Clear knowledge of the vision for the new platform.

Behaviours (TROPE)

- Trust
- Respect

- Optimism
- Patience
- Empathy

Sarah asked them for additional information in relation to question four. First, she asked that:

Who needs to know what, be able to do, and behave?

In other words which staff members need to have what behaviour, skills, and knowledge?

The LT identified that:

- The company does not currently have a dedicated project manager so they will buy in project management skills by employing a project manager who has experience using agile and has good leadership and management skills.
- The software development team is divided into those who work on the front-end and back-end.
- Those who work on the back-end need skills and knowledge on back-end technologies, although they do need to have a good understanding of how front-end technologies work too.
- Those who work on the front-end needs skills and knowledge on front-end technologies although they need to have a good understanding of how back-end technologies work.
- Both front-end and back-end developers need knowledge of lean software methodologies and how to implement them.
- Both front-end and back-end developers need knowledge of lean software methodologies and how to implement them.
- Both front-end and back-end developers need knowledge agile project management and how it is applied to developing software.
- Both front-end and back-end developers need knowledge of unit testing and must know how to do it.
- Some of those who work front-end, and back-end need to have the right behaviour to deliver on the project.
- Everyone in the organization needs to have a good understanding of the vision for the new platform. They must be able to speak about it confidently.

The second bit of information Sarah wanted to know was:

- Who are the right people to speak to get more detailed information about the answers to questions four.

The Head of IT said he can provide Sarah with more information to answer question four. The leadership team (LT) members also give Sarah a list of managers and team leaders who can also help her with more detailed information for the question. Sarah was ready to close the meeting, however before doing that she told them the two last questions which are:

- **Question five:** ***How will the learning and development function support people to know what they need to know, how to be able to do what they need to do, and the way they do it?***
- **Question six:** ***How will the organization know that learning and development has successfully supported the achievement of the strategic objective?***

Sarah reminded them that once the L&D team answered these questions, she would discuss them with the LT and other relevant managers. Sarah asked them for questions before she finished. They had one question:

- **When will the learning and development strategy be ready?**

Sarah told them that the strategy would be developed like a software. They will get a version 1.0 in two weeks' time. It will then be improved continually. Sarah closed the meeting, and it was time to discuss what happened with her team.

- She met with her team, she also spoke to the Head of IT, Design Manager, Development Manager, and a couple of team leaders who will be involved in the platform building project. She had now gathered enough information to answer **question 5 -** ***How will the learning and development function support people to know what they need to know, how to be able to do what they need to do, and the way they need to do it?***

Firstly, it was decided that the company would employ four new developers. Two to focus on the front-end and the other two the back-end. They would also act as mentors to the existing developers learning the new technologies.

The learning delivery strategy Sarah came up in conjunction with other key stakeholders involves the following steps:

- Ensure mentors are in place and run introductory face-to-face sessions.
- Subscribe to online learning websites offering access to video tutorials and eBooks.
- Identify key question and answer websites for support.
- Set development goals and assign measurable tasks to everyone.
- Meet each morning for 30 minutes to discuss progress and identify where people need support from mentors and other sources.

- Meet for 1 hour on Fridays to discuss learning.
- Sarah or one of her team members will attend all the meetings to collect information that will help them to gather progress of the project and how the learning delivery strategy is supporting the developers.

To answer question 6 - *How will the organization know that learning and development has successfully supported the achievement of the strategic objectives?*

Information from the meetings covering progress on the project and impact of the learning support is gathered weekly. Sarah sends an overview report of not more than one side of an A4 page to the leadership team every week detailing how the investment in learning and development is helping staff to build the platform.

She also monitors the situation to identify any extra learning needed. If there is any challenge or impediment to the progress of the project Sarah can quickly check with the managers if it is a knowledge, skills, or behaviour issue which can be tackled or if it is a motivation, environmental or other issue which can be discussed with the managers and LT team who are better placed to tackle such issues.

Sarah has now answered the six questions and has enough information for the learning and development strategy. She develops a version 1.0 and sends it to the LT all done under two weeks.