

## 5. Validate next steps and measures

### Importance

The impact of mastering these competencies is that you:

- Build support for the effective implementation of learning and other performance solutions.
- Identify which solutions to implement and their order of priority in consultation with the client.
- Set the stage for evaluation against specific business measures and desired performance outcomes.
- Identify priority tasks for learning.

### Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>5a</b>	<b>Prepare needs assessment report</b>
<input type="checkbox"/>	Prepare executive summary for the report
<input type="checkbox"/>	Present current and desired business goals
<input type="checkbox"/>	Present current and desired performance goals
<input type="checkbox"/>	Present participants' current and desired knowledge goals
<input type="checkbox"/>	Present participants' needs and limitations for participation in program
<input type="checkbox"/>	Present recommended options for learning and other performance solutions based on key findings
<input type="checkbox"/>	Present recommended options for supporting the transfer of learning
<input type="checkbox"/>	Explain purpose of needs assessment
<input type="checkbox"/>	Summarize key findings of needs assessment
<input type="checkbox"/>	Describe implications of not addressing the performance gaps
<input type="checkbox"/>	Describe process followed to conduct the needs assessment
<b>5b</b>	<b>Prepare program strategy report</b>
<input type="checkbox"/>	Prepare executive summary for the report
<input type="checkbox"/>	Present recommendations for learning and other performance solutions based on key findings
<input type="checkbox"/>	Identify the target audience for each solution or learning experience and determine whether participation is mandatory
<input type="checkbox"/>	Present recommendations for supporting the transfer of learning
<input type="checkbox"/>	Present desired performance outcomes and recommended business measures
<input type="checkbox"/>	Present recommendations for evaluating solutions
<input type="checkbox"/>	Present recommendations for how to assess participant reaction, learning objectives, and transfer of learning (application) at an aggregate level
<input type="checkbox"/>	Prepare draft implementation plan, including budget and work schedule

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- ▶ Present list of roles and responsibilities for everyone involved in creating the solution
  - ▶ Present recommendations for sustaining the program in the long-term or, at a minimum, include a list of questions for the client to answer to create a plan for the long-term sustainment of the program
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### **5c Present report to client**

- ▶ Prepare agenda for meeting with the client and key stakeholders
  - ▶ Present highlights of needs assessment report
  - ▶ Facilitate discussion with the client and key stakeholders
  - ▶ Respond to questions and address concerns
  - ▶ Confirm how and when the client will make decisions regarding recommendations
  - ▶ Confirm next steps and actions for advancing the plan
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### **5d Secure approval and support for recommended solutions**

- ▶ Incorporate modifications from client and key stakeholders
- ▶ Confirm with client the priority tasks or competencies for learning
- ▶ Validate implementation plan with client

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
<b>Needs assessment report</b>	Report includes executive summary, purpose, process, key findings, potential performance outcomes and recommended business measures, and implications of not addressing performance gaps
	Report updated to include modifications based on feedback from the client and key stakeholders
<b>Presentation of needs assessment report</b>	Presentation begins with an agenda
	Presentation highlights recommended learning and other performance solutions based on key findings
	Presentation provides an opportunity for client and stakeholders to ask questions
	Presentation addresses client's and stakeholders' questions and concerns
<b>Program strategy report</b>	Report includes executive summary, purpose, recommended solutions, success measures, workplan and budget for developing the program, workplan and budget for delivering the program, workplan and budget for sustaining the program, workplan and budget for evaluating the program, key roles and responsibilities, rationale for recommended learning and other performance solutions, target audience for learning, and whether learning is mandatory
	Report updated to include modifications based on feedback from the client and key stakeholders
<b>Presentation of program strategy report</b>	Presentation begins with an agenda
	Presentation highlights recommended learning and other performance solutions based on key findings
	Presentation addresses budget and schedule questions
	Presentation provides an opportunity for client and stakeholders to ask questions
	Presentation addresses client's and stakeholders' questions and concerns