

## Learning and Development Plan Template

Making the right investments in learning and development programs has never been more challenging— or essential— for business leaders.

Yet despite spending approximately [\\$164.2 billion dollars](#) on learning and development programs (L&D), many executives still struggle with how to improve L&D effectiveness. As [research shows](#), the need to revamp and improve learning programs is a key concern among HR executives.

Our clients that cultivate, professionally and personally develop, and engage their team via a L&D Plan enjoy increased retention, easier recruiting, and greater performance from their tribe.

A simple annual learning formula is:

- 10 days learning (approx. 60 hours) for all leadership and executive team members
- 24 hours learning for all other employees

So what does your tribe need to learn? It depends on where they are, and what their Individual Development Plan has them evolving into becoming.

Let's say for example that you have 4 categories of employees:

1. **Individual Contributors** – do not have direct reports
2. **Managers/Supervisors/Emerging Leaders** – have direct reports, are growing as leaders
3. **Leaders (on Leadership Team)** – have direct reports, are crucial to execution of company needle movers—some of your future executives will come from this group
4. **Executives (on Executive Team)** – they guide the company vision, mission, needle movers

Next we have 3 categories of Learning:

1. **Personal skills** – All employee categories benefit from these. Our clients like to consider mind, body, intellect, spirit (non-religious) here. Topics can include wellness, financial/retirement planning, parenting, communication, conflict resolution, stress management/meditation/mindfulness, emotional sensitivity/intelligence, outcome focus. These can be delivered as Lunch N' Learns or 30-60 minute sessions.
2. **Job skills** – All employee categories benefit from these. These are role-specific skills that are outlined in the employee's IDP and also in their current and possible future role's Impact Description.
3. **Leadership skills** – Managers, Leaders, Executives benefit from these. These include effective delegation, accountability/transparency/visibility, performance management and tracking, focus and HVA (high value activity) optimization, clarity in communication and

behavior, influencing self/others/outcomes, effective communication in meetings/emails/one:one, are quite a bit here—see the below section please.

## Using Webinars and Brief All-Hands Trainings Effectively

Our clients find that teaching everyone a standard set of tools and terms provides profound benefit to the tribe overall. To this end most of our clients have team or company-wide training on shortened versions of these four topics:

- Neuroscience of Leadership: *Lead with greater results using the SmartTribe Accelerators and the latest neuroscience techniques. Results: Leaders are respected more, followed more, loved more and more present, accountable, clear communicators, more influential and powerful, and creators of sustainable win-win cultures.*
- Neuroscience of Optimal Teams: *Diagnose and heal all culture and team challenges by using the most effective cultural, accountability and behavior modification structures. Results: Increased team alignment, feelings of safety, belonging, and mattering to the company at large. The net-net is improved results, accountability and morale.*
- Neuroscience of Influencing Outcomes: *Influence clients, team members, prospects, board members, people in general by learning how to join their frame of reference. Results: Greater impact of and receptivity to your communication. more productive & accurate team communication, deeper trust, better listening. The net-net is stronger relationships with key stakeholders.*
- Neuroscience of Managing Change: *Shift from a problem-focused culture to outcome-orientation by understanding your primary orientation and how to flip it. Results: When applied these tools encourage internal motivation from team members, high accountability and increase team members self-ownership of key initiatives. Cultures shift from seeing the problems to actively creating the outcomes they desire.*

The essence of each can be delivered in 1 hour with a few labs to solidify learning of new skills.

## Leadership Skills

Our clients use the attached Participant Progress Tracking docs for each of our four standard SmartTribes Trainings:

### Neuroscience of Compelling Leadership

Topic	Tool	1) Learning the Concept	2) Practicing Utilizing the Tool	3) Utilizing the Tool Automatic- ally
<b>Change</b>	Outcome Frame and Challenging Assumptions/Stuck States			
<b>Leadership Traits</b>	Modeling			
<b>Leadership Traits</b>	Cultivating Self and Others, Leadership Level Growth			
<b>Focus</b>	Inquiry Over Advocacy (5:1)			
<b>Focus</b>	Being Present with Self and Others			
<b>Focus</b>	HVA/LVA			
<b>Clarity</b>	Implicit vs. Explicit Communication in Leadership vs. Learning Scenarios			
<b>Clarity</b>	Communicating an Action Plan (South Park Lesson)			
<b>Clarity</b>	Effective Communication in Meetings (template)			
<b>Accountability</b>	Accountability Structures and Equation			
<b>Accountability</b>	Needle Movers			
<b>Accountability</b>	Tracking, Conversations, Celebrations			
<b>Cross Functional Accountability</b>	Perceptual Positions			
<b>Cross Functional Accountability</b>	Effective Decision Making, Taking Action			
<b>Influence</b>	Influencing Phrases			
<b>Influence</b>	Leadership Stances			
<b>Sustainability</b>	Energy Allocation Chart			
<b>Sustainability</b>	Ditch, Delegate, or Defer			
<b>Sustainability</b>	Effective Delegation			

## Neuroscience of Influence

Topic	Tool	1) Learning the Concept	2) Practicing Utilizing the Tool	3) Utilizing the Tool Automatic- ally
<b>Leadership</b>	Understanding Benefits of Rapport			
<b>Leadership</b>	Sensory vs. Non-Sensory Calibration			
<b>Rapport</b>	Physical Body Mirroring			
<b>Rapport</b>	Vocal Analog Mirroring			
<b>Rapport</b>	Sensory Systems and Preferences Mirroring			
<b>Rapport</b>	Key Words and Gestures Backtrack			
<b>Rapport</b>	Safety, Belonging, Mattering Triggers			
<b>Rapport</b>	Meta-programs, Profiling, Communication			
<b>Application</b>	Influential Leadership Communications			
<b>Application</b>	Interviewing with Rapport			
<b>Application</b>	Negotiations and Motivation			
<b>Application</b>	Giving Feedback and Resolving Conflict			
<b>Application</b>	Effective Networking and Relationship Building			

## Neuroscience of Optimal Teams

Topic	Tool	1) Learning the Concept	2) Practicing Utilizing the Tool	3) Utilizing the Tool Automatic- ally
<b>Optimize</b>	Creating A Cultural GAME (Growth, Appreciation, Measurement, Engagement) Plan			
<b>Analyze</b>	SBM (Safety, Belonging, Mattering) Index for Present State of Affairs of the Team			
<b>Neuroscience of Teamwork</b>	Understanding the importance of Meta-cognition through problem solving to create engagement			
<b>Alignment</b>	Mission, Vision, Values, Tribal Identity			
<b>Alignment</b>	Porter 5 Forces Team Strategic Thinking Exercise			
<b>Communication</b>	Guidelines for Effective Communication			

<b>Communication</b>	Meeting Makeover and Optimization			
<b>Collaboration</b>	Keys to Effective Collaboration			
<b>Collaboration</b>	Leadership Code of Conduct			
<b>Collaboration</b>	Recruit for Value Alignment			
<b>Collaboration</b>	Balance Prioritization and Innovation: NUF Test			
<b>Energy</b>	The One Thing That Matters			
<b>Energy</b>	Team Energy Allocation Chart			
<b>Energy</b>	Sleep and Meta-cognition			
<b>Leverage</b>	ID Non-useful Habits and the Trigger, Routine, Reward			
<b>Leverage</b>	Understanding Myelin Sheathing and Deep Practice			

## Neuroscience of Leading Change

<b>Topic</b>	<b>Tool</b>	<b>1) Learning the Concept</b>	<b>2) Practicing Utilizing the Tool</b>	<b>3) Utilizing the Tool Automatic- ally</b>
<b>Organizational Adoption Path</b>	Identify Stages			
<b>Define Desired Change Clearly</b>	Logical Levels of Present and Desired States			
<b>Tension to Empowerment</b>	Identify Tension Roles: Rescuer, Victim, Persecutor			
<b>Tension to Empowerment</b>	Create Shift through Outcome Frame/Questions			
<b>Effective Feedback</b>	Effective Feedback Stance and Principles			
<b>Effective Feedback</b>	DESC Assertiveness Script			
<b>Effective Feedback</b>	Short Form Script			
<b>Effective Feedback</b>	Formal Stages and Process			
<b>Managing Emotions</b>	Break States			
<b>Managing Emotions</b>	Stance and “Pacing and Leading”			
<b>Managing Emotions</b>	Connecting and Shifting Stuck States			
<b>Apologizing</b>	Effective Apology Scripting			
<b>Vision Communication</b>	Vision Creation and Communication with Metaphor			

## Ensure Your L&D Plan Works

Our friend Keith Ferrazzi reviewed recent research into learning and development programs, followed by a structured survey with top training executives at 16 major corporations in a diverse set of industries. From this research, he observed seven challenges companies must meet to create development programs that really work:

- 1. Ignite managers' passion to coach their employees.** Historically, managers passed on knowledge, skills, and insights through coaching and mentoring. But in our more global, complex, and competitive world, the role of the manager has eroded. Managers are now overburdened with responsibilities. They can barely handle what they're directly measured on, let alone offer coaching and mentoring. Organizations need to support and incentivize managers to perform this work.
- 2. Deal with the short-shelf life of learning and development needs.** It used to be that what you learned was valuable for years, but now, knowledge and skills can become obsolete within months. This makes the need to learn rapidly and regularly more important than ever. This requires organizations to rethink how learning and development happens from a once-in-a-while activity, to a more continuous, ongoing campaign. As Annette Thompson, Senior Vice President & Chief Learning Officer at Farmers Insurance pointed out in an interview, avoiding information overload is vital, so organizations must strike a balance between giving the right information versus giving too much.
- 3. Teach employees to own their career development.** Highly-structured, one-size-fits-all learning programs don't work anymore. Individuals must own, self-direct, and control their learning futures. Yet they can't do it alone, nor do you want them to. The development and growth of your talent is vital to your ongoing success, ability to innovate, and overall productivity. It's a delicate balance, one Don Jones, former Vice President, Learning at Natixis Global Asset Management summarized like this: "We need to have 'customized' solutions for individuals, while simultaneously providing scale and cost efficiencies across the organization," he said. Note we at STI stress that the employee must "own" their Individual Development Plan—this is essential.
- 4. Provide flexible learning options.** Telling employees they need to engage in more learning and development activities with their already heavy workload often leaves them feeling overwhelmed and consumed by the question, "When and how will I find the time?" Companies must respond by adopting on-demand and mobile solutions that make learning opportunities more readily accessible for your people. Webinars work great as it's easy to listen to the replay any time.
- 5. Serve the learning needs of more virtual teams.** While most organizations have more people working remotely and virtually, it does require more thought and creativity in how to train this segment of your workforce. This includes formal types of learning through courses, but also the informal mentoring and coaching channels. Just because employees are out of sight doesn't mean they get to be out-of-mind when it comes to learning and development. Again, webinars...
- 6. Build trust in organizational leadership.** People crave transparency, openness, and honesty from their leaders. Unfortunately, business leaders continue to face issues of trust. According to a [survey by the American Psychological Association](#), one in four workers say they don't trust their employer, and only about half believe their employer is open and upfront with them. If leaders disengage or refuse to share their own ongoing learning journeys, how can they expect their people to enthusiastically pursue theirs? It's the old adage of "lead by example." If managers want employees to engage in learning and development, then they need to show that they are actively pursuing their own personal learning journeys as well.

**7. Match different learning options to different learning styles.** With five generations actively in the workforce, organizations must restructure the way employees learn and the tools and activities they use to correctly match the different styles, preferences, and expectations of employees. For example, Millennials came of age using cell phones, computers, and video game consoles, so they expect to use these technologies to support their learning activities.

As leaders, we know the value our learning and development programs bring to our organizations. But we also want to ensure we're receiving a high return on investment. By clearly understanding the trends emerging in our learning and development programs, we'll better position our companies to select the right targeted solutions to drive results, increase employee engagement, and increase innovation and productivity.

Reach out to your STI coach as you create your Learning and Development Plan. We'll be happy to provide specific suggestions aligned with your culture.