THE STRATEGIC LEARNING REVIEW (SLR)

PROCESS GUIDELINES
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1) Application

The Learning Organisation should submit an Application Form (annex 1) together with a duly completed Datasheet (annex 2) setting out basic information about its structure and activities.

2) Preparation

The Corporate Learning Organisation designates a project leader who will interact with the EFMD as the direct contact in the preparation of the on-site visit. The putting together of the necessary documentation and the construction of the interview schedule will require a number of iterations by telephone conference and by exchange of emails. The success of the review process depends on the careful management of this preparatory phase.

In advance of the on-site visit, the Learning Organisation prepares the following documents:

a) The Six-Point Assessment Report
   The Learning Organisation fills in the SLR template (Annex 3) designed to provide an initial self-assessment by the L&D team. It will include a SWOT Analysis of the current situation and the key challenges facing the learning function in the company.

   The drafting of this document should not be seen as a self-promotional exercise, but as an objective attempt to identify shortcomings and unexploited opportunities.

   It should also be an occasion to solicit critical input from key stakeholders within the company (Executive Committee, Corporate HR, senior line managers, etc).

   The Six-Point Self-Assessment Report should, if necessary, be accompanied by an updated version of the Datasheet.

   This report will serve as a starting point for the one-day visit by the EFMD experts.

b) Supporting Documents
   Additional documents such as brochures, PowerPoint or Website presentations of the Learning Organisation’s structure and activities should be provided as background information.

c) The Schedule of Meetings and Interviews
   The schedule of meetings for the one-day visit should be agreed ahead of time between the EFMD and the Learning Organisation.
Confirmation of the on-site visit: Please note that the on-site visit cannot be carried out unless adequate preparatory documentation has been submitted in good time: The Assessment Report including the SWOT Analysis (a), the Supporting Documents (b) and the Interview Schedule (d) should be submitted one month before the date of the on-site visit. It is essential that the visiting experts come with a sufficient understanding of the Corporate Learning Organisation so that no time is lost extracting basic information: If the information provided is insufficient to ensure a productive on-site visit, the EFMD reserves the right to postpone the event.

3) The On-Site Visit

The Review visit will be carried out by a team of two EFMD experts. The experts are experienced members of the EFMD Corporate Services staff and former Chief Learning Officers with wide exposure to the L&D environment.

They will arrive on-site during the afternoon or evening preceding the event. This will be the occasion for an initial encounter during dinner between the visiting experts and a small group composed of the Head of the Corporate Learning Organisation and one or two key stakeholders such as the Corporate HR Director or other Board level sponsors.

Schedule for the Morning

1) A one and a half hour meeting with the Learning Organisations’s management team. The focus of the meeting will be on the Self-Assessment Report and the challenges that the Learning Organisation is facing. It is assumed that the EFMD experts are already informed about the structure and activities of the Learning Organisation.

2) Four parallel 45 minute meetings with the following profiles (8 interviews in total):
   - Senior line managers responsible for nominating their subordinates to the Learning Organisation’s programmes
   - Learning Business Partners responsible for the client interface
   - Programme managers
   - Participants from the flagship programmes
   - Experienced facilitators

   In these meetings the focus will be on the alignment of the programme portfolio with the Learning Organisation’s mission and strategic objectives.
Schedule for the Afternoon

3) Four parallel 45 minute meetings (8 interviews in total) with key stakeholders or clients such as:

   Head of Corporate HR
   Head of Executive Development
   Head of Talent Management
   Business Unit CEOs

In these meetings the focus is on the adequacy of the Learning Organisation’s structure, positioning, resources and programme portfolio with respect to the company’s strategic agenda. Is it serving the right purpose? And is it serving that purpose effectively?

4) The visiting experts meet alone for one hour to prepare their immediate feedback.

5) 1 hour Wrap Up with the Learning Organisation’s management team.

   During this meeting the visiting experts will convey their first impressions and engage in a concluding dialogue with the Learning Organisation’s management team.

   Due to time constraints, the reviewers will conduct the interviews by asking questions. The interviewees should be advised that any background information should be sent ahead of time and that they are not expected to make formal presentations.
4) Outcomes

The Final SLR Report

A five- to ten-page report will be sent to the company within one month following the visit. The report will set out the findings and conclusions of the review:

- An assessment of each of the six areas highlighting the strong points and the shortcomings observed.
- An overall assessment of the coherence of the six areas as a functioning system. The emphasis will be on the fit between the different parts of the system and the overall alignment with the strategic agenda of the company at large.
- The report will seek to clarify issues, to target problem areas, to raise awareness of the crucial challenges for the future.
- Where appropriate the report may make specific recommendations for future development.

Optional Follow Up

Unlike CLIP, the Strategic Learning Review is not defined as a continuous improvement and development process, but is intended to provide an x-ray of the Learning Organisation’s situation at a single moment in time.

However, avenues for future development are clearly available, among which:

- Consulting Service with one of the EFMD certified experts. This may take a variety of forms, for instance:
  - Assistance in defining and implementing an action plan for the development of the Learning Organisation
  - A follow-up visit six months or one year later to monitor progress in the deployment of the Learning Organisation
  - A follow-up visit six months or one year later to focus on progress made in dealing with one specific issue emerging from the initial review

- Possible application for CLIP accreditation when the reviewers have indicated in the final report that the Learning Organisation may already meet or be close to meeting the CLIP Eligibility criteria.
ANNEX 1: APPLICATION FORM

APPLICATION FORM ¹

To EFMD SLR – STRATEGIC LEARNING REVIEW

I, the undersigned _______________________________________________ (name)

______________________________________________________________ (position)

representative of _______________________________________________ (name of organisation)

confirm the application of my organisation to undertake the EFMD SLR – Strategic Learning Review

We note that the cost of this service to my organisation will be €10,000. The direct travel and accommodation costs of the experts will also be charged to my organisation. We also confirm that we will accept the Review process, the results of this process. EFMD aisbl, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the Review process. The afore-mentioned shall also not be liable for the use by the organisation of the recommendations nor for any delay in the Review process.

We fully understand and agree with EFMD’s general terms and conditions below.

General Terms and Conditions

1. The signatory of this Application Form certifies he/she is a representative who is authorised to commit her/his organisation to go through EFMD SLR.
2. Fee: The total fee for the SLR is 10,000€, payable upon the submission of the application.
3. The recipient organisation will be charged directly by the experts for their travel, accommodation and other direct expenses for the on site visit.
4. Invoices and expenses claims shall be paid preferably by bank transfer, free of any bank charges, within 30 days of presentation of the invoice
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the organisation decides unilaterally to stop the process after the application, a fee of 5,000€ will be charged. Cancellation must be confirmed in writing.
7. The Belgian law shall apply to any and all disputes arising out of the process. In case of dispute, only the courts of Brussels are competent.

Signature: __________________________ Date: ______/_____/________

Stamp of the organisation:

Organisation: .................................................................................
Department: ...................................................................................
Address: ..........................................................................................
.................................................................................................
.................................................................................................
City and Country: ...........................................................................
Telephone: ......................... Fax: .........................
VAT Identification Number (Please provide for invoicing purposes): ....................................

(see art. 5 of General Terms and Conditions)

¹ For EFMD Members
APPLICATION FORM

TO EFMD SLR – STRATEGIC LEARNING REVIEW

I, the undersigned ____________________________________________ (name)
______________________________________________________________ (position)
representative of ________________________________________________ (name of organisation)
confirm the application of my organisation to undertake the EFMD SLR – Strategic Learning Review

We note that the cost of this service to my organisation will be €12.000. The direct travel and accommodation costs of the experts will also be charged to my organisation. We also confirm that we will accept the Review process, the results of this process. EFMD aisbl, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the Review process. The afore-mentioned shall also not be liable for the use by the organisation of the recommendations nor for any delay in the Review process.

We fully understand and agree with EFMD’s general terms and conditions below.

General Terms and Conditions

1. The signatory of this Application Form certifies he/she is a representative who is authorised to commit her/his organisation to go through the SLR.
2. Fee: The total fee for the SLR is 12,000€, payable upon the submission of the application.
3. The recipient organisation will be charged directly by the experts for their travel, accommodation and other direct expenses for the on site visit.
4. Invoices and expenses claims shall be paid preferably by bank transfer, free of any bank charges, within 30 days of presentation of the invoice.
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the organisation decides unilaterally to stop the process after the application, a fee of 5,000€ will be charged. Cancellation must be confirmed in writing.
7. The Belgian law shall apply to any and all disputes arising out of the process. In case of dispute, only the courts of Brussels are competent.

Signature: __________________________ Date: _______/_____/________
Stamp of the organisation:

Organisation: ..................................................................................................
Department: ...............................................................................................
Address: .................................................................................................
....................................................................................................................
City and Country: .................................................................................
Telephone: ................. Fax: ...............................................................
VAT Identification Number (Please provide for invoicing purposes): .................................

(see art. 5 of General Terms and Conditions)

2 For EFMD Non-Members
<table>
<thead>
<tr>
<th><strong>ANNEX 2: DATASHEET</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic Learning Review (SLR) Datasheet</strong></td>
</tr>
<tr>
<td><strong>Section A: Company Overview</strong></td>
</tr>
</tbody>
</table>

Name of company:

Headquarters Address:

Industry (e.g., Fast Moving Consumer Goods):

Business/Businesses (e.g., Confectionary, Pet Food, etc.):

Number of employees:

Structure (e.g., Divisions and Strategic Business Units, Geographical presence):

Strategic priorities of company (e.g., globalization, growth, industrialization, repositioning):
Section B:

L&D Organisation Overview

Name of Corporate L&D Organisation:

(i.e. Corporate University, Academy, Institute, etc. Where appropriate please give the name both in the language of the country and the equivalent in English)

Year of launch:

Brief history (key dates and evolution):

Head of Corporate L&D Organisation (Chief Learning Officer, Director,…..):

Name:

Title:

Address:

Corporate L&D Organisation (please describe or insert organisation chart):

Other L&D organisations in the company, if existing (e.g., at business, regional or country level):

Please describe the Core Purpose and Strategic Missions of the Corporate L&D Organisation:

What is the intended positioning of the Corporate L&D Organisation within the company?
## Section C: Operational Model

### ACTIVITIES & MARKETS

1. Please indicate the scope of the Corporate L&D Organisation’s and other stakeholders’ programs and activities:

<table>
<thead>
<tr>
<th>Professional Development</th>
<th>Corporate L&amp;D Organisation</th>
<th>Other L&amp;D Organisations (if existing)</th>
<th>Human Resources</th>
<th>Other (please specify)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management &amp; Executive Development</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Coaching, Mentoring &amp; Informal Learning</td>
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<tr>
<td>Talent Management</td>
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<tr>
<td>Performance Management</td>
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<tr>
<td>Engagement Survey</td>
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<td></td>
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<td></td>
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<tr>
<td>Organization Development</td>
<td></td>
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<tr>
<td>Pedagogical consulting</td>
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<tr>
<td>Innovation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communities of Practice</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Networking &amp; Learning</td>
<td></td>
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<td></td>
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<tr>
<td>Knowledge Management</td>
<td></td>
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</tr>
<tr>
<td>Business Development</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

2. Internal markets served:

<table>
<thead>
<tr>
<th>Corporate level only</th>
<th>Corporate L&amp;D Organisation</th>
<th>Other L&amp;D Organisations (if existing)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All business units</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of business units served</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Categories and levels of staff served:

<table>
<thead>
<tr>
<th>Executive management</th>
<th>Corporate L&amp;D Organisation</th>
<th>Other L&amp;D Organisations (if existing)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior management</td>
<td></td>
<td></td>
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<tr>
<td>Middle management</td>
<td></td>
<td></td>
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<tr>
<td>High potentials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisory staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Functional staff (sales, finance, HR, etc)</td>
<td>Technical staff</td>
<td>Other (please specify)</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>----------------</td>
<td>-----------------------</td>
</tr>
</tbody>
</table>

4. External markets served:

<table>
<thead>
<tr>
<th></th>
<th>Corporate L&amp;D Organisation</th>
<th>Other L&amp;D Organisations (if existing)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suppliers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**STRUCTURE**

1. The Corporate L&D Organisation is:
   - Part of a corporate function (indicate which function)
   - Part of a business entity (indicate which entity)
   - Part of a geographical entity (indicate which entity)

2. The main reporting line is:
   - Directly to the CEO
   - To the Head of Corporate HR
   - To a Senior Executive or Board Member reporting to the CEO
   - Other (please provide each intermediate reporting level up to the CEO)

3. The Corporate L&D Organisation is:
   - A pure corporate level organisation
   - A multi-local organisation (by country, region or major location of employment)
   - A multi-product/multi-function organisation (by product division, product group or corporate function)

4. Which decision-making/execution model describes best how L&D overall is organized:
   - Centralised decision making and centralised execution
   - Centralised decision making and coordinated decentralised execution
   - Coordinated decentralised decision making and coordinated decentralised execution
   - Coordinated decentralised decision making and decentralised execution

5. Please describe the interfaces with HR processes (e.g., talent management, succession planning):

6. Please describe the coordination with other L&D Organisations within the company (if existing):
GOVERNANCE

1. Does the Corporate L&D Organisation have a structured dialogue with the company’s Executive Committee:
   • Yes
   • No

If yes, in what format:

How often per year:
   • Once per year
   • Every 6 months
   • Every 3 months
   • Every month
   • Other (please indicate)

2. Does the Corporate L&D Organisation have an internal governing body (or multiple bodies) responsible for strategic oversight:
   • Yes
   • No
   • If more than one, please list

If yes, who are its members in terms of their role in the company:

If yes, what are its 3 main responsibilities:

3. Does the Corporate Learning Organisation have an external governing or advisory body (i.e. with non-company members)?
   • Yes
   • No

If yes, who are its members in terms of their roles outside the company:

If yes, what are its 3 main responsibilities?
RESOURCES

1. Please indicate the distribution of resources working for the Corporate L&D Organisation:

<table>
<thead>
<tr>
<th></th>
<th>Own headcount</th>
<th>Performed by external suppliers (% of total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Partnering</td>
<td></td>
<td></td>
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<tr>
<td>Program Management</td>
<td></td>
<td></td>
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<tr>
<td>Program Design</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Delivery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services (own IT, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning Administration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Number of company resources available for delivery of learning interventions of the Corporate L&D organisation:

- Board Members
- Senior line managers
- Certified Facilitators/Trainers
- Other

3. External Suppliers of the Corporate L&D organisation:

- List the 5 key partners (academic institutions, consulting companies, outsourcing service providers)

4. Locations and Facilities of the Corporate L&D organisation (e.g. main headquarters, central training facilities, residential facilities, decentralised training centres, etc):

5. IT Resources of the Corporate L&D organisation:

- Learning Management System (LMS):
- Volume and percentage of learning delivered online (in learning hours):
- Other L&D management and support platforms (please specify):

6. Funding Model of the Corporate L&D organisation (Cost/Profit Centre; Charges to Business Units/Central HR/Central HQ, etc):
Section D:
Business Impact

1. Describe the Quality Assurance Processes in place within the Corporate L&D Organisation:

- Participant feedback
- Line manager surveys
- Correlation studies
- Reporting system
- Needs analysis process
- Key performance indicators
- Learning balanced scorecard
- etc.

2. Measurement of Impact

- What are the indicators used to measure the impact of L&D on:
  - Individual performance?
  - Organisational performance?

3: Learning Investment Indicators:

<table>
<thead>
<tr>
<th>By the Corporate L&amp;D Organisation</th>
<th>In the company as a whole (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of participants reached:</td>
<td></td>
</tr>
<tr>
<td>Number of unique participants reached:</td>
<td></td>
</tr>
<tr>
<td>Number of unique employees reached in %:</td>
<td></td>
</tr>
<tr>
<td>Number of participant hours per year:</td>
<td></td>
</tr>
<tr>
<td>Average number of participant hours per person</td>
<td></td>
</tr>
<tr>
<td>Learning spend as % of payroll:</td>
<td></td>
</tr>
<tr>
<td>Average learning spend per person:</td>
<td></td>
</tr>
</tbody>
</table>
ANNEX 3: THE SIX-POINT ASSESSMENT REPORT

Strategic Learning Review
Six-Point Self-Assessment Report

This document is intended to serve as a template for the Learning Organisation’s own self-assessment in preparation for the on-site visit by the two reviewers. It should, therefore, be sufficiently descriptive to provide the reviewers with the information they need for an adequate understanding of the Learning Organisation. It must also be sufficiently self-critical to allow a constructive discussion of problems and difficulties.

The document will also serve as a framework for the SLR reviewers in making their evaluation and in drafting the final report.

Introduction: Brief history and description of the Learning Organisation

This introductory section is related to the SLR Datasheet that was submitted at the beginning of the process. The Datasheet should, therefore, be updated and attached to this report.

1: The Mission

a) Brief description of the core purpose of the Learning Organisation within the company. Explain how this core purpose is translated into strategic objectives and priorities for the Learning Organisation.

b) What are the processes for defining and updating the mission and key strategic objectives?

c) How is the mission aligned with the strategic agenda of the company itself?

d) If there is a formal, published mission statement, please insert it here

e) To what extent does the Learning Organisation play a proactive transformational role within the company as a motor of innovation and creativity?

2: The Mandate and Scope

a) Define the scope of the Learning Organisation’s mandate in line with its strategic objectives as described above.

   • What are the principal target groups of managers and employees?
   • What are the principal types of L&D interventions that are offered to the different target groups?

b) To what extent does the Learning Organisation have the necessary authority to fulfill its mandate?

c) What authority does the Learning Organisation have to federate L&D beyond the corporate centre?

d) To what extent is the current mandate stable? Is the scope of the Learning Organisation’s activities likely to be changed or extended in the future?
3: Positioning

a) Where is the Learning Organisation positioned in the company’s Organisation Chart?

b) How does it interface with the major HR functions?

c) Describe the reporting lines. How well is the Learning Organisation connected to Executive Committee decision-making levels?

4: The Operating Model

a) Describe the internal structure of the Learning Organisation (sub-units, departments, project groups, IT support units, etc.)

b) Staffing and resources

c) The business model

d) Location and physical facilities

e) To what extent are the above elements adequately defined in the context of the Learning Organisation’s strategic agenda?

5: The Offer: the Portfolio of Programmes and Service

a) Describe the L&D offer, listing the principal target groups and the principal L&D objectives for each group

b) Explain how the above organization of the L&D offer enables the Learning Organisation to achieve the objectives within its mandate. How effectively is it covering the target markets with an appropriate offer?

6: Governance

a) How is the oversight function organized to maintain effective alignment with the company’s strategic agenda?

b) How does the governance system ensure adequate input from key stakeholders within the company?

c) How does the governance system ensure an adequate link to the company’s key decision-making processes?

Conclusions: The SWOT Analysis

a) Based on the above six-point self-assessment, what are the Learning Organisation’s strong and weak points?

b) How well equipped is it to pursue its vision and to fulfill its objectives?

c) What are the positive factors that favour success?

d) What are the inhibiting factors that slow down progress?
In preparing material for this critical analysis it is important to collect a variety of input from different stakeholders across the company. This can be achieved by means of panel discussions or a simple questionnaire.

**Conclusions: The GAP Analysis**

a) Explain where the Learning Organisation finds itself at this moment in time on its itinerary towards achieving its ambitions.

b) What still remains to be done? What are the main development challenges within the current strategic agenda?

**Conclusions: Looking to the future**

What are the different scenarios for the next stages in the Learning Organisation’s deployment within the company?