Brandon Hall GROUP

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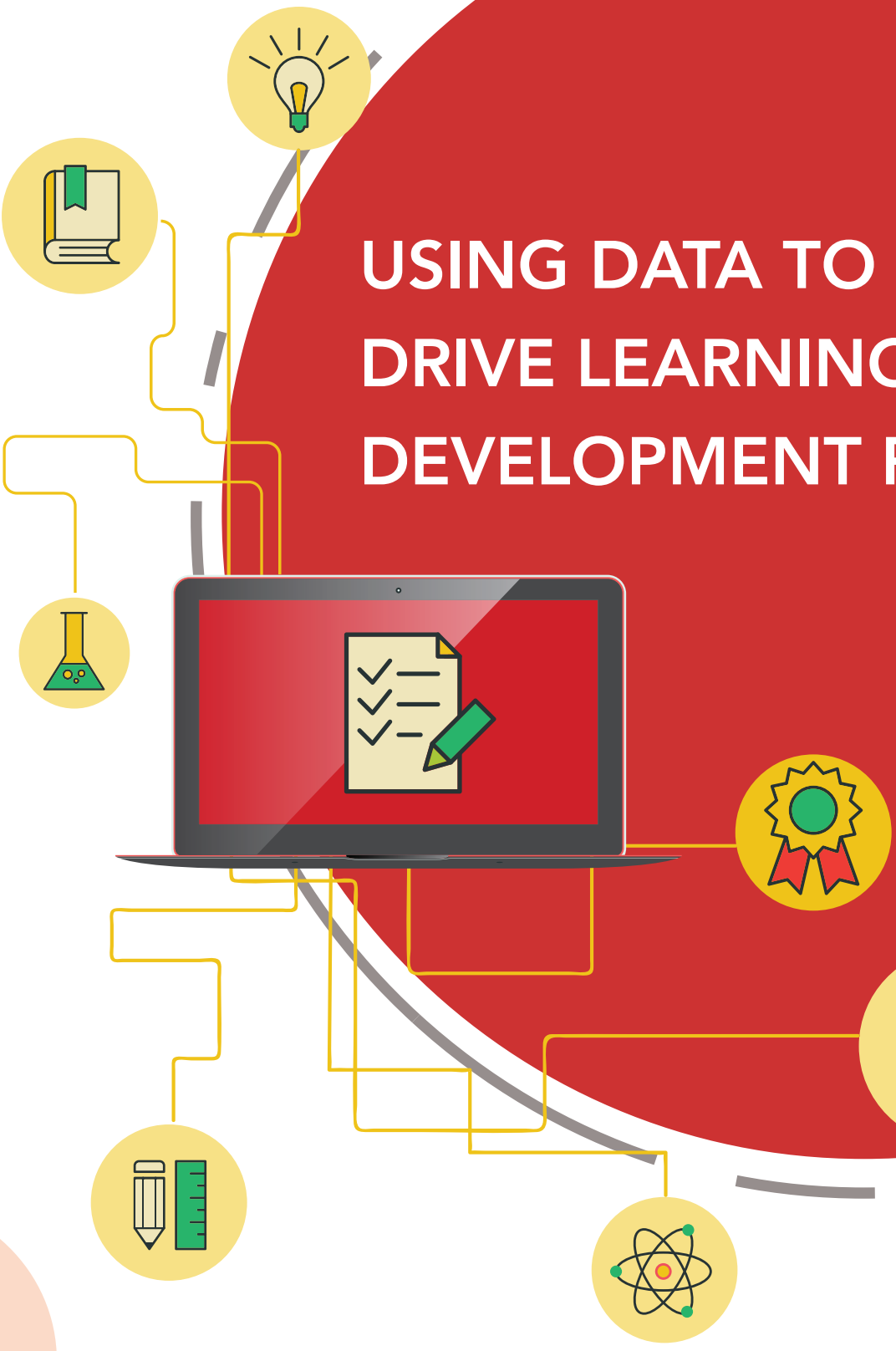
USING DATA TO DRIVE LEARNING AND DEVELOPMENT PLANNING



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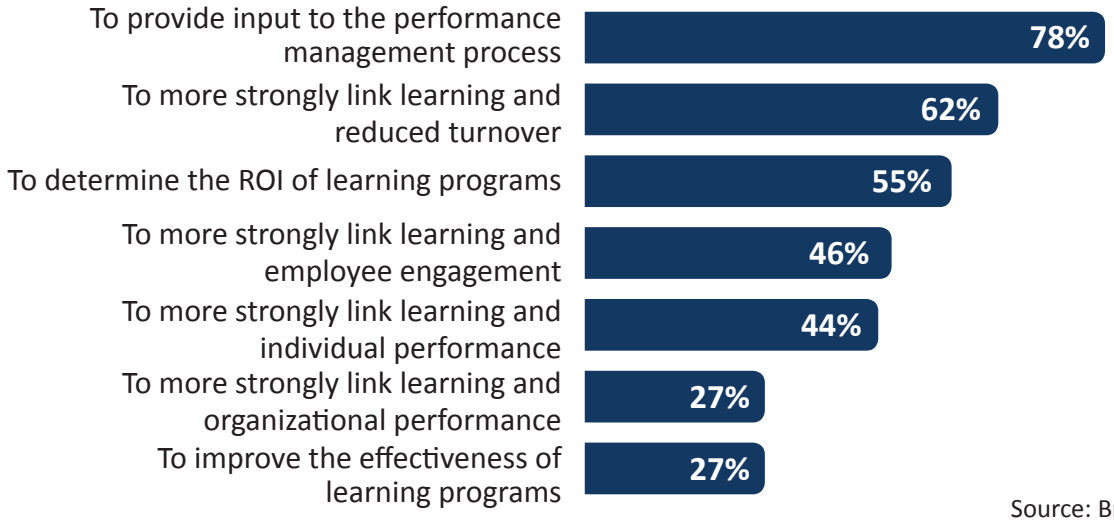
Drivers Behind Learning Measurement



Source: Brandon Hall Group

Data fuels organizational and departmental transformation. How data informs change in human and digital interactions helps bridge the gap during an organization's transformation. Whether you are upskilling the workforce to rapid transformation, or minimizing the impacts of a merger and acquisition, the need for data has never been greater.

In Learning and Development, data was used to tell CLOs and business leads about the efficiency and efficacy of their workforce learning. In our digital age, it's not enough to just measure learning. The data must also be used to plan learning and any digital interactions needed to help increase the effectiveness and efficiency of workplace learning, thus transforming the learning environment and the organization.

Data is the fuel by which business runs today, and Learning and Development is no exception. There is an ocean of data available to organizations, but it can be a challenge finding the right data to help plan ahead and make sure the learning being delivered is as efficient and effective as possible.

According to Brandon Hall Group's 2018 Learning Measurement Survey, improving the effectiveness of learning programs is the number one reason companies measure their learning.

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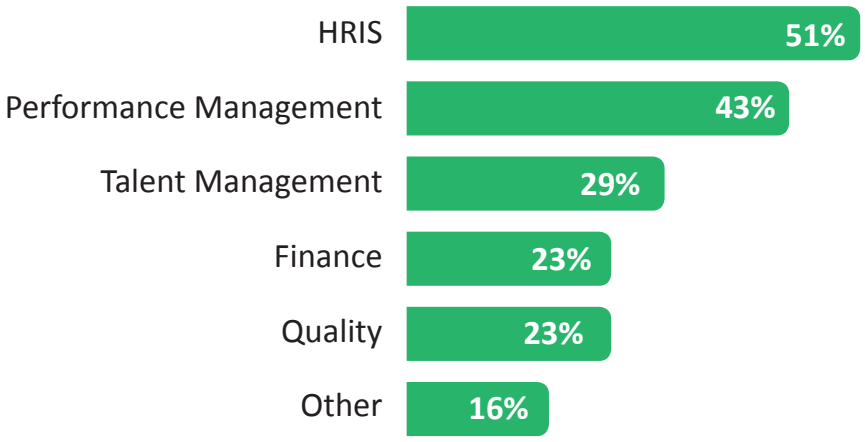
40% OF COMPANIES SAY THEIR LEARNING STRATEGY IS SHAPED BY TALENT DATA FROM ACROSS THE ORGANIZATION.

The sheer volume of data available is a double-edged sword; it can be difficult to make sense of it all. More than half of companies do not have access to data analysts. Additionally, most companies are not taking advantage of the data provided by systems outside of learning. Performance management data can be a critical part of analyzing learning's effectiveness, yet less than half of companies use this data.

Data Challenges

18%	We have data analysts dedicated to learning
29%	We have data analysts who are shared across the organization
40%	We have no actual data analysts, but have employees using data analysis tools
13%	We have no internal data analysts

Data Sources Used for Learning Analysis



Source: Brandon Hall Group

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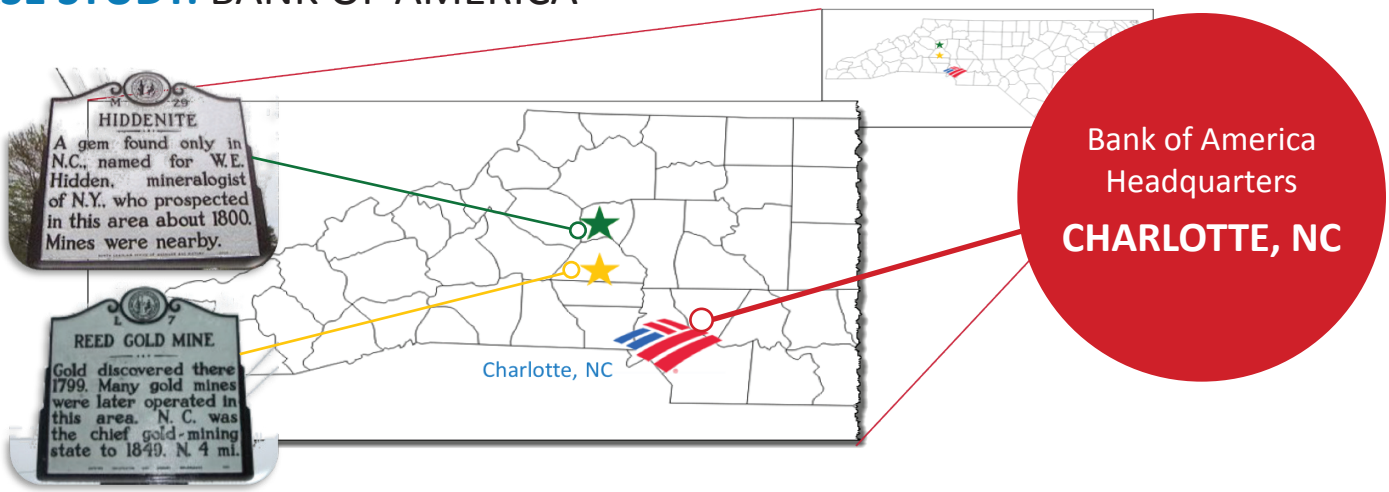
Challenge of Learning and Development Planning

Learning planning is typically done annually, resulting in the following challenges:

- Top of mind thinking
- Heavy emphasis on current viewpoint
- Missed trends throughout the year
- Results in high cancellation rates
- No data driven solution, only guesses based on past experience

CASE STUDY: BANK OF AMERICA



- 47 million consumer and small business relationships
- 34 million digital banking clients
- More than 200,000 employees
- 4,500 retail financial centers
- 16,000 ATMs
- Operations in 50 states
- Operations in more than 35 countries

Bank of America is one of the world's leading financial institutions, serving individual consumers, small and middle-market businesses and large corporations with a full range of banking, investing, asset management and other financial and risk management products and services. The company serves approximately 47 million consumers and small businesses with approximately 4,500 retail financial centers, approximately 16,000 ATMs, and digital banking with approximately 34 million active users, including 23 million mobile users.

In parallel to the mining history of its home state of North Carolina, Bank of America developed a thorough process for mining data to continuously improve the delivery of learning. It is called the Enterprise Learning and Development Tool (ELDT).

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Enterprise Learning and Development Tool (ELDT)

- Strategic Business Planning and Portfolio Management Tool
- End-to-End; Concept to Completion
- Four Stage Workflow:
  1. Inception
  2. Performance Consultation
  3. Plan Approvals and Management
  4. Audience Identification and Execution
- Customer Relationship Management (CRM) System for Learning
- Curation-Enabler
- Key Differentiator = Data Integration

Planning Your Data Mining

WHAT?

- Business Strategy/Priorities
- Business Operations
- Laws, Rules & Regulations
- Human Capital/ Talent Management

WHERE?

- Annual Strategic Plan - Initiative Planning Docs - Business Goals/Scorecard(s)
- Procedures - Policies - Systems/Technology
- Regulatory Tracking System
- Performance Management - Assessment (i.e. 360^{o} Feedback) - Acquisition Forecasts

WHY?

- Role-Based Performance Change Expectations
- Role-Based Functional Change Expectations
- Required and Proactive Adherence Standards
- Key Competency Gaps/ Opportunities - New Hire Target/Volume Planning

BoA has standards for the data it collects. The data must come from a large enough sample set to be statistically valid. It also must be a reliable data source. Finally, the data needs to be stable and not fluctuate wildly over periods of time.

They also have three methods of obtaining data. It can be pulled in manually, automatically uploaded, or fed directly into the tool from the data source.

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Planning Your Data (How?)

Quality Standard

- Sizable
- Reliable
- Stable

Loading Raw Data

- Manual
- Upload
- Integrated Feed

Unearthing the Gems (How?)

Business Rules Defined for Data Analysis

Business Operations
Business Strategy/Priorities
Laws, Rules & Regulations
Human Capital/Talent Management

- **Data Type/Set Specific**
- **"Flag" the Source**
- **Standards/Thresholds**
- **Volume Shifts**
- **Timing**
- **In Year / Year-Over-Year**

In order to unearth the gems within the data, BoA applies a set of business rules to each of the data types they collect.

Each of the four types of data has a specific data set associated with it.

- Source data owners can flag data as potentially impactful to learning
- Patterns and cutoffs are identified and used to evaluate performance data
- Changes in data volume are evaluated to identify normal patterns and anomalies
- Seasonality patterns in data changes are identified
- Data examined within an annual span, as well as comparing year-to-year

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Successful Data Mining

"You'll not only need to take in massive amounts of data, you'll need to be able to process it and think through it and intellectually assess it to determine what's important."

- Bank of America CEO Brian Moynihan

3 Steps to Successfully Refining Data

1. Source of your data
2. Story of the data
3. Redefine rules, if needed

Successful data mining is not simply about taking in massive amounts of data. It is about finding the right data to answer questions about learning's impact on the business, and it can be done on any scale. Companies need to identify the available data sources within the organization and how they can be accessed. Once the data is identified, it needs to be analyzed to find out what it means. Where are the patterns, the shifts, the anomalies? As the process moves forward, the rules being applied can be refined over time to create truly meaningful analysis.

Data Mining Changes the Dialog

Learning measurement needs solid baselines to identify when and if things are changing. Gathering data with nothing to compare it to is meaningless. By comparing changes to the baselines, patterns emerge and seemingly chaotic variations will be identified as shifts that can be predicted and even mitigated, if necessary.

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About Brandon Hall Group

Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management.

With more than 10,000 clients globally and almost 25 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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GET HELP TO DRIVE RESULTS FOR YOUR TALENT

In today's volatile and global business climate, managing talent for high-performance plays an increasingly crucial role in an organization's growth and future success. Effective talent management is a top priority in organizations everywhere because, while organizations recognize the need to obtain and retain people with the very best skills, they continue to struggle to implement effective strategies to do so. HR and Learning professionals need to be able to successfully define organizational talents needs and skills, identify talent strengths and career goals, and align organizational needs to individual needs. Rethink your strategy, validate your assumptions, transform your business, and optimize your time with the use of reliable data, tools, and guidance.

PLAN ATTRACT DEVELOP PERFORM RETAIN OPTIMIZE

GET HELP WITH YOUR HR SERVICES MANAGEMENT & DELIVERY

As described in the employee lifecycle, processes are linked to employee transactional processes (e.g., compensation, benefits, compliance, contingent workforce management, etc.) via workforce planning and analytics.

Policies/Process/Procedure
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Expense Management
Benefits & Compensation
Contingent Workforce Management
Compliance
Time & Labor Management

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At the core of our offerings is a Membership Program that combines research, benchmarking and unlimited access to data and analysts. The Membership Program offers insights and best practices to enable executives and practitioners to make the right decisions about people, processes, and systems, coalesced with analyst advisory services which aim to put the research into action in a way that is practical and efficient. Membership also provides you direct access to our seasoned team of thought leaders dedicated to your success, backed by a rich member community, and proactive support from our client services team.

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