

VERSION 1.1
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A GUIDE FOR USERS

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WLP Scorecard™ A Guide For Users: Version 1.1
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Acknowledgements

THINK TANK

The indicators in the WLP Scorecard were conceived by a think tank of learning, performance, and measurement experts. Members of the ASTD Benchmarking Forum also contributed to the design and functionality.

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Overview

WHAT IS THE WLP SCORECARD?

The WLP Scorecard is an online, real-time, benchmarking, and decision-support tool that allows organizations to:

- monitor and benchmark a broad range of financial, operations, customer, and innovation indicators for the learning function
- customize reports with subsets of organizations and indicators
- compare the alignment, efficiency, effectiveness, and sustainability of an enterprise learning function, as well as the overall quality of the learning function, with hundreds of other organizations
- diagnose strengths and weaknesses in variables that affect alignment, efficiency, effectiveness, and sustainability
- perform sensitivity analysis to see potential effects of adjustments to multiple variables on alignment, efficiency, effectiveness, and sustainability
- make decisions about all aspects of learning, including investments, staffing, processes, and the type and amount of formal and work-based learning opportunities to provide.

LEVELS OF USE

The WLP Scorecard has three levels of use:

- **Free** Requires data input and provides comparisons on a small set of indicators
- **Subscription:** Access to general, customized, and diagnostic reports on all indicators.
 - Full Scorecard Report - Static Index Scores
 - Full Scorecard and WLP Index Reports
 - Dynamic WLP Index Scores
 - Index diagnostics and sensitivity analysis
- **ASTD Benchmarking Forum:** Access to organization-level data for Forum member organizations.

ACCESS

All levels of use require a unique organization ID and password. There is only one user ID per organization with one person designated as the primary contact.

CONFIDENTIALITY

All data are kept strictly confidential. Users will see only their own data as well as summary statistics for comparison groups. The Benchmarking Forum confidentiality agreement covers Benchmarking Forum member access to organization-specific data.

System Requirements

COMPUTER PLATFORM

The WLP Scorecard is supported for PCs running the Microsoft Windows operating system. The WLP Scorecard is best viewed at a resolution of 800x600 or higher.

INTERNET CONNECTION

A broadband internet connection is recommended for use of the WLP Scorecard.

WEB BROWSER

The WLP Scorecard is supported in Microsoft Internet Explorer 6 or later.

BROWSER REQUIREMENTS

- For security of your data, it is recommended you use a browser capable of 128-bit encryption.
- In order to use the WLP Scorecard, your browser must be configured to accept session cookies. The WLP Scorecard depends on this type of cookie to function properly. To enable your browser's session cookies, follow the instructions below.
- JavaScript must be enabled in your browser in order to fully utilize all the features of the WLP Scorecard. JavaScript is used to enhance usability and interactivity of the WLP Scorecard. To enable your browser's JavaScript, follow the instructions below.
 - Enabling Session Cookies: (If using Microsoft Internet Explorer)
 - Click on Tools on the menu bar.
 - Click on Internet Options.
 - Click on the Privacy tab.
 - Set slide bar to Medium or Click Default button.
 - Click OK to Exit.
 - Enabling JavaScript: (If using Microsoft Internet Explorer)
 - Click on Tools on the menu bar.
 - Click on Internet Options.
 - Click on the Security Tab.
 - Click Custom Level.
 - Scroll Down to Scripting.
 - Active Scripting and Scripting of Java Applets should be checked as enabled.
 - Click OK to Exit.


NOTES


We recommend that the WLP Scorecard is run on a PC running Microsoft Windows/Internet Explorer 6 or greater. As the WLP Scorecard is a web-based application, it should run on any platform/browser combination that supports iframes, SSL, session cookies, and JavaScript - including Firefox, Netscape, Safari, and others. However, it is impossible to test every platform/browser combination, so the WLP Scorecard is only supported for Microsoft Windows/Internet Explorer 6 or greater. We cannot guarantee that all aspects of the WLP Scorecard will run as intended within other environments.

Login

SUBSCRIBER OR
ASTD
BENCHMARKING
FORUM
MEMBER

Step 1 Navigate browser to <http://wlpscorecard.astd.org>.
The following screen should appear in your browser:

**WLP Scorecard**

**ASTD**
WORKPLACE LEARNING & PERFORMANCE

Organization ID: Password: |

Overview

What is the WLP Scorecard?	<p>The WLP Scorecard is an online real-time benchmarking and decision support tool that allows organizations to</p> <ul style="list-style-type: none">• monitor and benchmark a broad range of learning function financial, operations, customer, and innovation indicators• customize reports with subsets of organizations and indicators• compare the alignment, efficiency, effectiveness, and sustainability of an enterprise learning function, as well as the overall quality of the learning function, with hundreds of other organizations• diagnose strengths and weaknesses in variables that affect alignment, efficiency, effectiveness, and sustainability• perform sensitivity analysis to see potential effects of adjustments to multiple variables on alignment, efficiency, effectiveness, and sustainability• make decisions about all aspects of learning, including investments, staffing, processes, and the type and amount of formal and work-based learning opportunities to provide
Levels of Use	<p>The WLP Scorecard has three levels of use</p> <ul style="list-style-type: none">• Free Requires data input and provides comparisons on a small set of indicators• Subscription Access to general, customized, and diagnostic reports on all indicators• Benchmarking Forum Access to organization level data for Forum member organizations
Access	<p>All levels of use require a unique access code. There is only one access code per organization with one person designated as the primary contact.</p>
Confidentiality	<p>All data are kept strictly confidential. Users will only see their own data as well as summary statistics for comparison groups. The Benchmarking Forum confidentiality agreement covers Benchmarking Forum members' access to organization-specific data.</p>

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Step 2 Enter your Organization ID and password, then click the “Login” button

WLP Scorecard **ASTD**
WORKPLACE LEARNING & PERFORMANCE

Organization ID: 57942 Password: Login Pre-Register

Overview

What is the WLP Scorecard?

The WLP Scorecard is an online real-time benchmarking and decision support tool that allows organizations to

- monitor and benchmark a broad range of learning function financial, operations, customer, and innovation indicators
- customize reports with subsets of organizations and indicators

Step 3 You will be taken to the Overview Screen, with a blue navigation bar toward the top of the screen. Click one of the tabs to input data or get reports.

WLP Scorecard **ASTD**
WORKPLACE LEARNING & PERFORMANCE

Overview | Organization Profile | Input | Scorecard Reports | Index Reports | Support

Overview

What is the WLP Scorecard?

The WLP Scorecard is an online real-time benchmarking and decision support tool that allows organizations to

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- customize reports with subsets of organizations and indicators

Navigation

SIX SECTIONS

There are six sections in the WLP Scorecard: **Overview**, **Organization Profile**, **Input**, **Scorecard Reports**, **Index Reports**, and **Support**. To move between sections, click the label in the blue navigation bar corresponding to the area to which you wish to navigate. There is no required sequence for using the WLP Scorecard.



The screenshot displays the WLP Scorecard interface. At the top, there are two logos: the WLP Scorecard logo on the left and the ASTD logo on the right. Below the logos is a blue navigation bar with six links: Overview, Organization Profile, Input, Scorecard Reports, Index Reports, and Support. The 'Overview' link is highlighted with a red oval. Below the navigation bar, the 'Overview' section is displayed. It contains four sub-sections: 'What is the WLP Scorecard?', 'Levels of Use', 'Access', and 'Confidentiality'. Each sub-section has a corresponding text block and a list of bullet points.

WLP Scorecard

ASTD

[Overview](#) | [Organization Profile](#) | [Input](#) | [Scorecard Reports](#) | [Index Reports](#) | [Support](#)

Overview

What is the WLP Scorecard?

The WLP Scorecard is an online real-time benchmarking and decision support tool that allows organizations to

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FIRST TIME USERS

If this is your first visit, click Organization Profile in the top blue navigation bar. You will be taken to the Organization Profile page. Please enter all the fields completely before entering any data in the Input section.



RETURNING USERS

If you are a returning user, navigate to a desired section. Data entries from your most previous visit will be available for modification, or for generating reports. Data entry fields left blank from previous visits will be available for entry.

NAVIGATING INPUT

When you select Input from the top blue navigation bar, you will see a year drop-down menu and three tabs for the categories of input: Workplace, Learning, and Performance. Clicking on one of these tabs will reveal a list of subcategories for data input. Each input page has boxes where you enter data for a particular input variable. The input variable names can be clicked to reveal definitions.

Note that some screens contain input fields with red boxes and corresponding red-colored text. **Input fields surrounded by a red box require a valid entry** in order to generate a Scorecard report.

[Overview](#) | [Organization Profile](#) | [Input](#) | [Scorecard Reports](#) | [Index Reports](#) | [Support](#)

Input - Year: 2006

Workplace
Learning
Performance


[Investment](#) | [Learning Function Staff/Talent](#) | [Learning Function Processes](#) | [Output \(Formal Learning\)](#) | [Output \(Work-Based Learning\)](#) | [Infrastructure](#) | [Outsourcing](#) | [Integration](#) | [Usage \(Formal Learning\)](#) | [Usage \(Work-Based Learning\)](#)

<u>Total Direct Learning Investment</u>	<input style="border: 1px solid red;" type="text"/>	\$ (USD)
<u>Total Indirect Learning Investment</u>	<input style="border: 1px solid red;" type="text"/>	\$ (USD)
<u>Percentage of Direct Cost for Learning by Type of Solution</u>		
Formal Learning	<input style="border: 1px solid red;" type="text"/>	%
Work-Based Learning	<input style="border: 1px solid red;" type="text"/>	%
Non-Learning Solutions	<input style="border: 1px solid red;" type="text"/>	%
Total 0		%
<u>Integration with Business Planning</u>		
	<input style="border: 1px solid blue;" type="text"/>	(0-10)
<u>Unplanned Learning Expenditure</u>	<input style="border: 1px solid blue;" type="text"/>	\$ (USD)
<u>Budget Centralization</u>	<input style="border: 1px solid blue;" type="text"/>	%
<u>External Services Expenditure</u>	<input style="border: 1px solid red;" type="text"/>	%
<u>Tuition Reimbursement Expenditure</u>	<input style="border: 1px solid red;" type="text"/>	%
<u>Learning Staff Costs (Including Benefits and Taxes)</u>	<input style="border: 1px solid blue;" type="text"/>	%
<u>Learning Staff Costs (Excluding Benefits and Taxes)</u>	<input style="border: 1px solid blue;" type="text"/>	%
<u>Expenditure on Technology Infrastructure</u>	<input style="border: 1px solid blue;" type="text"/>	%

NAVIGATING SCORECARD REPORTS

When you select Scorecard Reports from the top blue navigation bar, you can access four Scorecard Reports (Financial, Operations, Customer, and Innovation) by clicking on the tabs. To get a customized report, click the Customize tab. If you are a Benchmarking Forum member, select the BMF tab for additional customization options.

WLP Scorecard


ASTD
 WORKPLACE LEARNING & PERFORMANCE

[Overview](#) | [Organization Profile](#) | [Input](#) | [Scorecard Reports](#) | [Index Reports](#) | [Support](#)

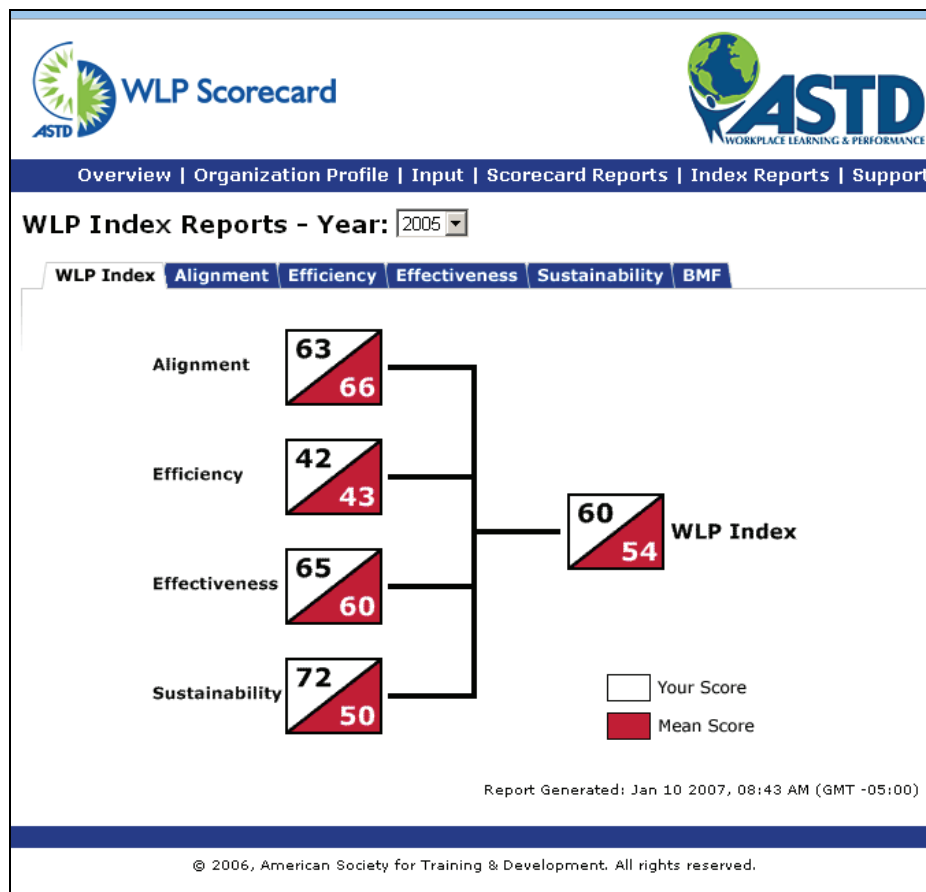
Scorecard Reports - Year: 2005

[Financial](#) | [Operations](#) | [Customer](#) | [Innovation](#) | [Customize](#) | [BMF](#)

Financial Indicators	Your Organization		All Organizations				
	Value	Rank	Mean	Median	Min	Max	n
Expenditure (total) per employee	\$3,224.76	0	\$1,672.92	\$1,061.53	\$42.65	\$4,951.2	10
Expenditure (total direct) per employee	\$2,008.69	0	\$1,041.22	\$931.68	\$38.77	\$2,136.36	13
Expenditure (direct formal) per employee	\$1,104.78	0	\$1,234.8	\$941.53	\$7.75	\$3,784.57	22
Expenditure (direct work-based) per employee	\$703.04	0	\$193.58	\$93.17	\$0	\$640.91	11
Expenditure (direct formal) as percentage of payroll (excluding benefits/taxes)	2.26%	0	1.71%	1.35%	0.02%	5.99%	19
Expenditure (total) as percentage of total compensation	0.94%	0	2.47%	1.43%	0.11%	7.01%	6
Expenditure (total) as percentage of payroll	6.58%	0	2.8%	2.13%	0.14%	8.47%	10
Expenditure (total) as percentage of revenue	0.43%	0	12.7%	0.87%	0.03%	100%	10
Expenditure (total) as percentage of income/profit	2.79%	0	25.52%	4.96%	-0.03%	152.3%	7
Percentage of direct expenditure on external services	50%	0	25.03%	21.25%	0%	70.9%	28
Percentage of direct expenditure on tuition reimbursement	37%	0	11.51%	8.1%	0.07%	71%	27
Percentage of direct expenditure on technology infrastructure	42%	0	8.23%	6.9%	0%	20%	11
Percentage of direct expenditure on learning staff	60%	0	37.32%	38%	28.6%	50%	5

NAVIGATING INDEX REPORTS

When you select Index Report from the top blue navigation bar, as a Subscriber or Benchmarking Forum member, you can access diagnostic reports on Efficiency, Effectiveness, Alignment, and Sustainability by clicking the tabs. If you are a Benchmarking Forum member, you can access member company scores by clicking the BMF tab.



Before You Begin

LOGIN ADDRESS

<http://wlpscorecard.astd.org>

REQUIRED FIELDS

Input fields surrounded by a red box are required in order to generate a Scorecard report.

NO “SUBMIT” OR “SAVE” BUTTONS

There are no “submit” or “save” buttons. Data is saved/updated automatically when you leave a particular input field.

NO “NEXT” OR “BACK” BUTTONS

There are no “next” or “back” buttons. Users may proceed in any order by using blue navigation bar across the top, the tabs, and the subcategory links on each page.

ONE-YEAR INPUTS AND REPORTS

Data inputs and reports are for one year at a time. In the final product you will select the year for which you want to enter data or for which you want to see reports from a list of years.

REPORT ALL MONETARY FIGURES IN ACTUAL U.S. DOLLARS (USD)

Enter all monetary figures in actual U.S. dollars. Please *do not* enter monetary figures in denominations of thousands, millions, billions, or any denomination or aggregation other than actual dollars. For example, if your organization has an annual learning budget of \$5,700,000, please enter “5700000”, not “5.7”, or “.57”. Organizations using currencies other than USD must convert all monetary figures from their home currency to USD using the exchange rate effective the date of entering figures into the WLP Scorecard.

Input

THREE MAIN CATEGORIES

There are three main categories of data input: **Workplace, Learning, and Performance**. Within these three categories are several subcategories.

SUBCATEGORIES

The three main categories of data input, **Workplace, Learning, and Performance**, are organized into the following subcategories:

Workplace	Learning	Performance
<ul style="list-style-type: none">• Workforce• Compensation• Talent Management• Performance Management• Employee Engagement• Innovation	<ul style="list-style-type: none">• Investment• Learning Function Staff/Talent• Learning Function Processes• Output (Formal Learning)• Output (Work-Based Learning)• Infrastructure• Outsourcing• Integration• Usage (formal Learning)• Usage (Work-Based Learning)	<ul style="list-style-type: none">• Capability• Productivity• Business Outcomes• Perceptions



ENTER OR EDIT DATA

Step 1 Select **Input** in the top blue bar.

Step 2 Select one of the three tabs labeled **Workplace, Learning,** or **Performance**.

Step 3 Select one of the subcategories listed below the rows of links.

Step 4 Enter data into empty data fields or change existing data as desired.

**WLP Scorecard**

Overview | Organization Profile | **Input** | Scorecard Reports | Index Reports | Support

Input

Workplace | Learning | Performance

Workforce | [Compensation](#) | [Talent Management](#) | [Performance Management](#) | [Employee Engagement](#) | [Innovation](#)

Workforce Size FTE

Workforce Composition

Executives and Senior Managers	<input type="text" value="50"/>	FTE
Middle Managers	<input type="text" value="100"/>	FTE
First Line Supervisors	<input type="text" value="200"/>	FTE
Production/Technical	<input type="text" value="25"/>	FTE
Administrative	<input type="text" value="100"/>	FTE
Customer Service	<input type="text" value="100"/>	FTE
Sales	<input type="text" value="400"/>	FTE
IT	<input type="text" value="20"/>	FTE
Other	<input type="text" value="5"/>	FTE
Total	1000	FTE

Hourly Employees FTE

Employees Outside Home Country %

Workforce Dispersion num

Workforce Education Level years

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VIEW INPUT DEFINITIONS

To view the definition of any input indicator, click the label text. The definition will appear as a pop-up window. A complete list of input variables and definitions is available in the “Input Definitions” section of the *User’s Guide*.

WLP Scorecard

Workforce Size

Average total number of workers across all months in the year. If your organization is a bank, you may alternatively enter an end-of-year figure. Employees includes: all employees of consolidated domestic and international subsidiaries; all part-time and seasonal employee; all employees classified by an FTE basis; corporate officers. Exclude contracted workers and consultants, board members, and employees of unconsolidated subsidiaries. Enter as FTE. Source: HRIS.

Executives and Senior Managers FTE

Middle Managers FTE

First Line Supervisors FTE

Production/Technical FTE

Administrative FTE

Customer Service FTE

Sales FTE

IT FTE

Other FTE

Total 1000 FTE

Hourly Employees FTE

Employees Outside Home Country %

Workforce Dispersion num

Workforce Education Level years

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Scorecard Reports

FOUR SCORECARD REPORTS

There are four Scorecard Reports: Financial, Operations, Customer, and Innovation. Each Scorecard Report contains a set of indicators relevant to the category chosen (Financial, Operations, Customer, and Innovation).

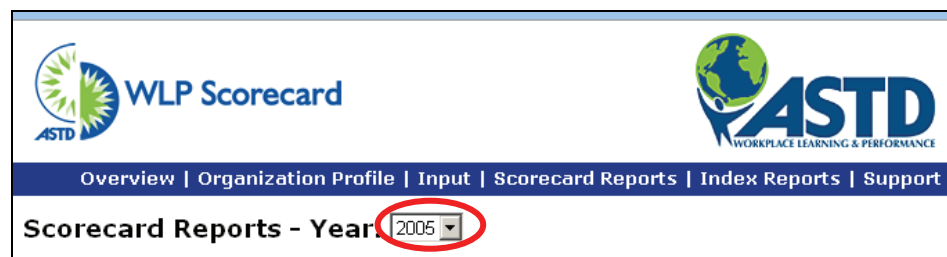
- **Financial Indicators** monitor and compare financial aspects of the learning function. They cover expenditures and cost ratios.
- **Operations Indicators** monitor and compare operational aspects of the learning function. They cover staffing, processes, and output indicators.
- **Customer Indicators** monitor and compare the internal learning function's customer behavior and satisfaction. They cover usage, learner satisfaction, and manager satisfaction.
- **Innovation Indicators** monitor and compare innovative aspects of the learning function. They cover integration, work-based learning, and performance improvement.

CUSTOMIZED REPORTS

In the Customize section, select types of organizations and a subset of indicators to generate a customized report.

VIEW AND DOWNLOAD A SCORECARD REPORT



Step 1 Select the year for which you want a report (from the drop-down Year menu).



The screenshot shows the WLP Scorecard website interface. At the top, there are two logos: the WLP Scorecard logo on the left and the ASTD logo on the right. Below the logos is a navigation bar with the following links: Overview | Organization Profile | Input | Scorecard Reports | Index Reports | Support. Below the navigation bar is a section titled 'Scorecard Reports - Year' with a dropdown menu. The dropdown menu is open, showing the year '2005' selected. The year '2005' is circled in red.

Step 2 Select the Financial, Operations, Customer or Innovation tab.

The Scorecard Report displays a list of indicators with a value for your organization, the rank of your organization compared to all other organizations in the Scorecard database, and the mean, median, minimum, and maximum for all organizations in the database, as well as the number of organizations in the database.

[Overview](#) | [Organization Profile](#) | [Input](#) | [Scorecard Reports](#) | [Index Reports](#) | [Support](#)

Scorecard Reports - Year: 2005

Financial
Operations
Customer
Innovation
Customize
BMF

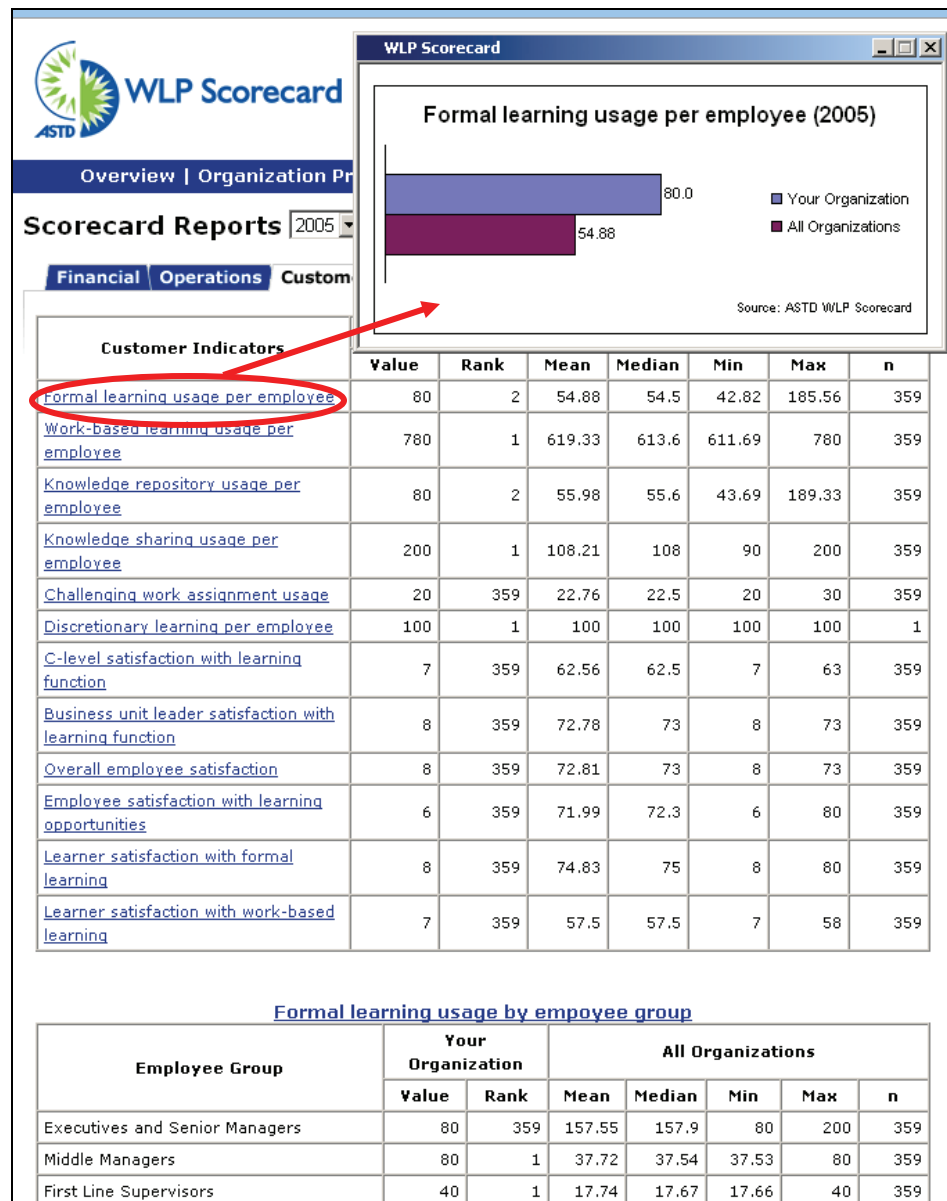
Customer Indicators	Your Organization		All Organizations				
	Value	Rank	Mean	Median	Min	Max	n
Formal learning usage per employee	39.3	0	33.56	28.4	1.94	99.66	26
Work-based learning usage per employee	174.13	0	7,782.52	7,782.52	115.04	15,450	2
Knowledge repository usage per employee	3.13	0	0.01	0	0	0.04	4
Knowledge sharing usage per employee	68	0	7,255	7,255	10	14,500	2
Challenging work assignment usage	5	2	22.5	22.5	5	40	2
Discretionary learning per employee	3	0	77.5	77.5	5	150	2
C-level satisfaction with learning function	7.2	0	7.2	8	5	9	5
Business unit leader satisfaction with learning function	8.1	0	8	8	7	9	6
Overall employee satisfaction	8.2	0	7	7	5	9	7
Employee satisfaction with learning opportunities	6.4	0	6.43	6	4	9	7
Learner satisfaction with formal learning	9.3	0	8.33	8	8	9	6
Learner satisfaction with work-based learning	5.1	0	5.2	6	0	7	5

[Formal learning usage by employee group](#)

Employee Group	Your Organization		All Organizations				
	Value	Rank	Mean	Median	Min	Max	n
Executives and Senior Managers			15.72	14.29	0.87	32	3
Middle Managers			2.79	2.5	0.19	5.67	3
First Line Supervisors			2.03	0.8	0.4	4.88	3

Step 3 Download the report by cutting and pasting into a spreadsheet or word processing document.

Step 4 Display a chart for an indicator by clicking an indicator name. The chart comparing your score with the mean of all organizations will appear in a pop-up window.



Step 5 Download the chart by right-clicking and selecting Save. You can cut and paste the .jpg file into any document.

CREATE A CUSTOMIZED REPORT

Step 1 Select the Customize tab.

WLP Scorecard **ASTD** WORKPLACE LEARNING & PERFORMANCE

Overview | Organization Profile | Input | Scorecard Reports | Index Reports | Support

Scorecard Reports

Financial **Operations** **Customer** **Innovation** **Customize** **BMF**

Select Organizations:

Organization Size: All

Organization Type: All

Industry: Finance and Insurance

Region: All

Country: All

Year: 2004

Select Indicators: (Hold the CTRL key to select multiple indicators)

Financial

- Expenditure (total) as percentage of revenue
- Expenditure (total) as percentage of income/profit
- Percentage of direct expenditure on external services
- Percentage of direct expenditure on tuition reimbursement

Operations

- Integration of learning requirements and business planning process
- Ratio of employees to learning staff
- Centralization of learning staff
- Centralization of learning budget

Customer

- Formal learning usage per employee
- Work-based learning usage per employee
- Knowledge repository usage per employee
- Knowledge sharing usage per employee

Innovation



- Percentage of all learning usage that is work-based
- Ratio of knowledge repository content to formal learning content
- Integration of learning with work
- Integration of formal and work-based learning

Generate Report

Step 2 Select the type of organizations you want to be compared to by using the drop-down menus for Organization Size, Industry (NAICS), Region, Country, and Year.

Step 3 Select one or more indicators that you want to compare. Use the CTRL key to select multiple indicators.

Step 4 Click the **Generate Report** button at the bottom of the page to create and display a Customized Scorecard Report.

[Overview](#) | [Organization Profile](#) | [Input](#) | [Scorecard Reports](#) | [Index Reports](#) | [Support](#)

Scorecard Reports - Year: 2004

Financial
Operations
Customer
Innovation
Customize
BMF

Selection Criteria	Your Selection
Year	2004
Organization Size	All
Organization Type	All
Industry	Finance/Insurance
Region	All
Country	All

Financial Indicators	Your Value	Selected Organizations				
		Mean	Median	Min	Max	n
Expenditure (direct formal) per employee		\$1,334.36	\$1,030.29	\$80.55	\$3,327.41	36
Expenditure (direct formal) as percentage of payroll (excluding benefits/taxes)		2.37%	2.05%	0.01%	6.21%	33
Percentage of direct expenditure on external services		29.99%	23.2%	0%	100%	33
Percentage of direct expenditure on tuition reimbursement		11.68%	8.25%	0%	70%	32

Report Generated: Jan 10 2007, 09:05 AM (GMT -05:00)

Index Reports

INDEXES

There are four Indexes that measure the Alignment, Efficiency, Effectiveness, and Sustainability of your learning function compared to all organizations in the database. These are combined to generate an overall **WLP Index**.

- The **Alignment Index** measures the extent to which the learning function is aligned with organizational goals and other aspects of the organization.
- The **Efficiency Index** measures the efficiency of the learning function.
- The **Effectiveness Index** measures organizational productivity, human capital, financial performance, employee retention, and satisfaction.
- The **Sustainability Index** measures the extent to which the learning function can sustain its current level of success.
- The **WLP Index** is a combination score based on alignment, efficiency, effectiveness, and sustainability scores. The WLP Index represents the overall quality of the learning function.

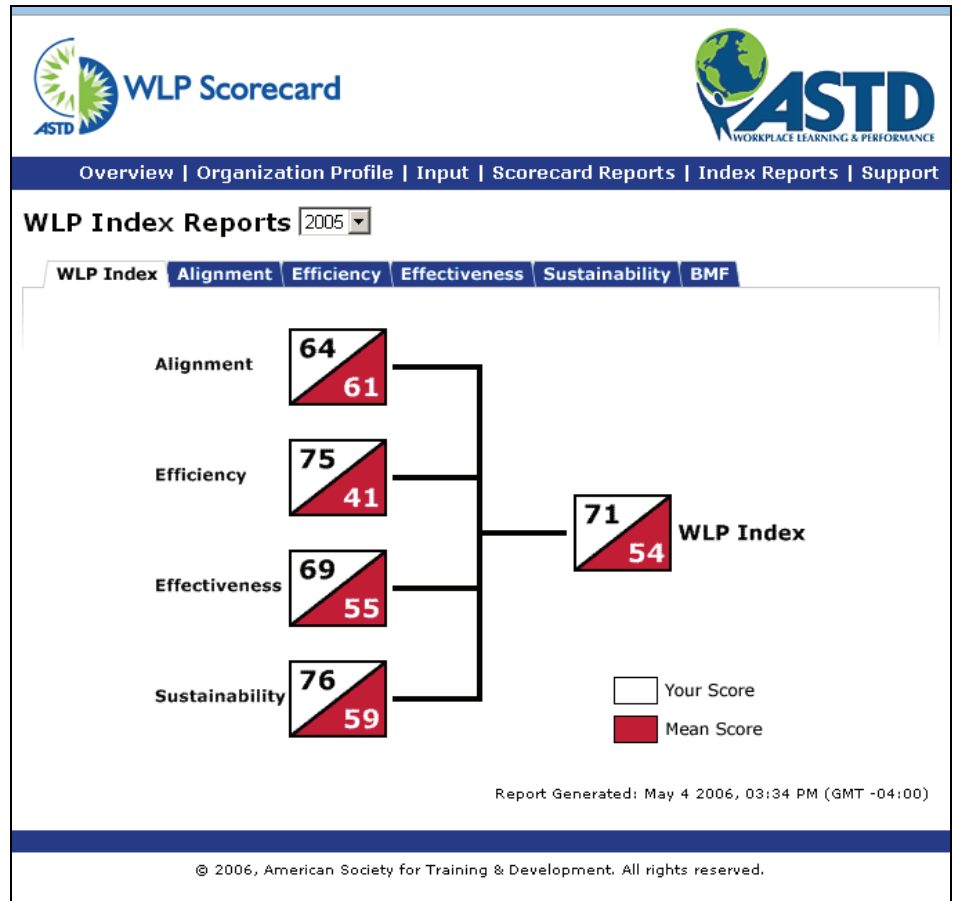
For all Indexes, the scale is 0 to 100, with 0 as the lowest score, and 100 the highest score.

VIEW INDEX SCORES

To **view your WLP Index scores**, click **Index Reports** in the blue navigation bar. For each of the five indexes, your score is presented in a square graphic, with your score in the upper left section of the square, and the average score for all organizations in the database in the red-shaded section to the lower right.

DIAGNOSTIC REPORTS

VIEW DIAGNOSTIC REPORTS

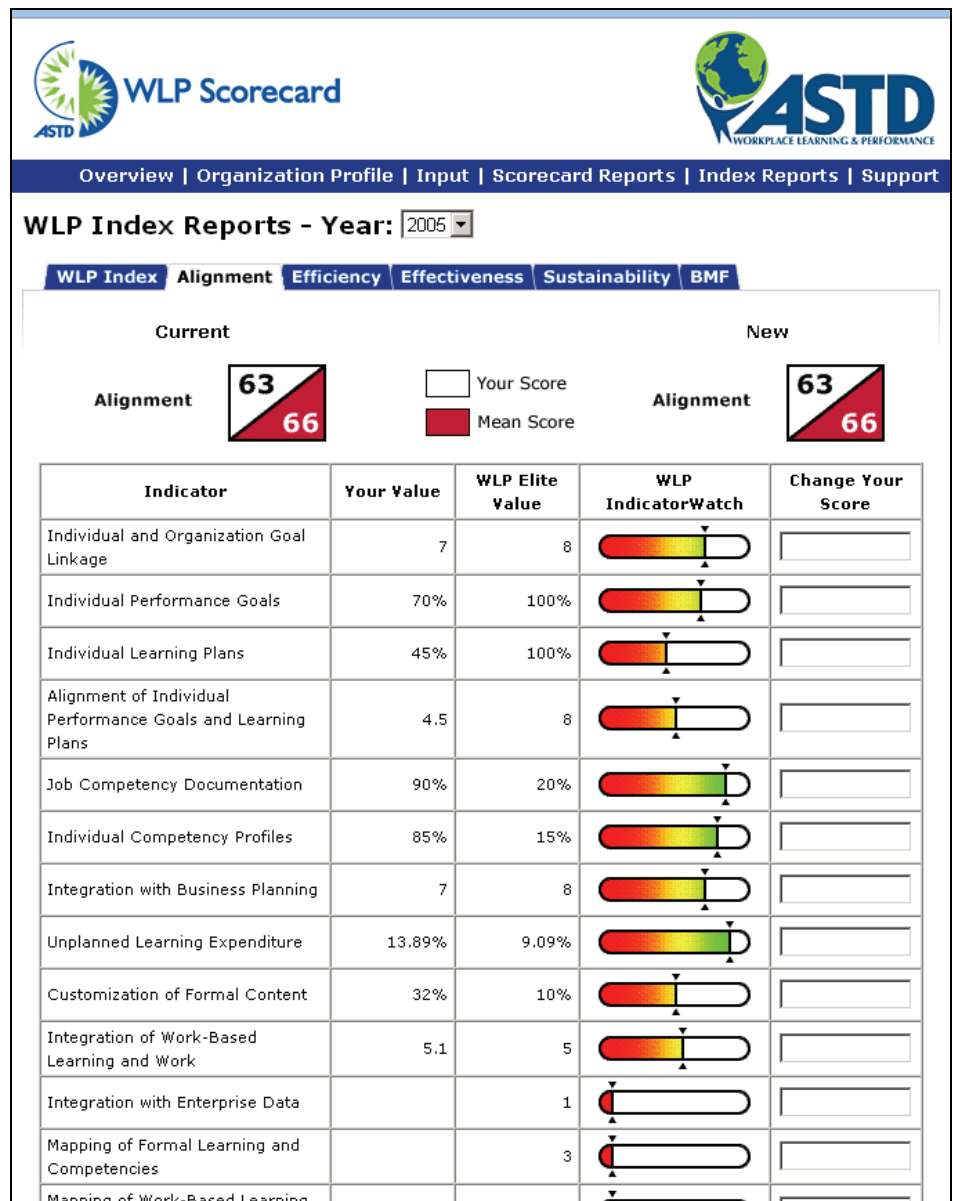


Subscribers can access Index reports that diagnose strengths and weaknesses in variables that affect Alignment, Efficiency, Effectiveness, and Sustainability. The Index reports list the indicators used to calculate the index scores and highlights which are strong, moderately strong or weak. In addition, you can perform a sensitivity analysis to determine how changes in indicators affect the index score.

Step 1 Select the year for which you want a report (from the drop-down Year menu).

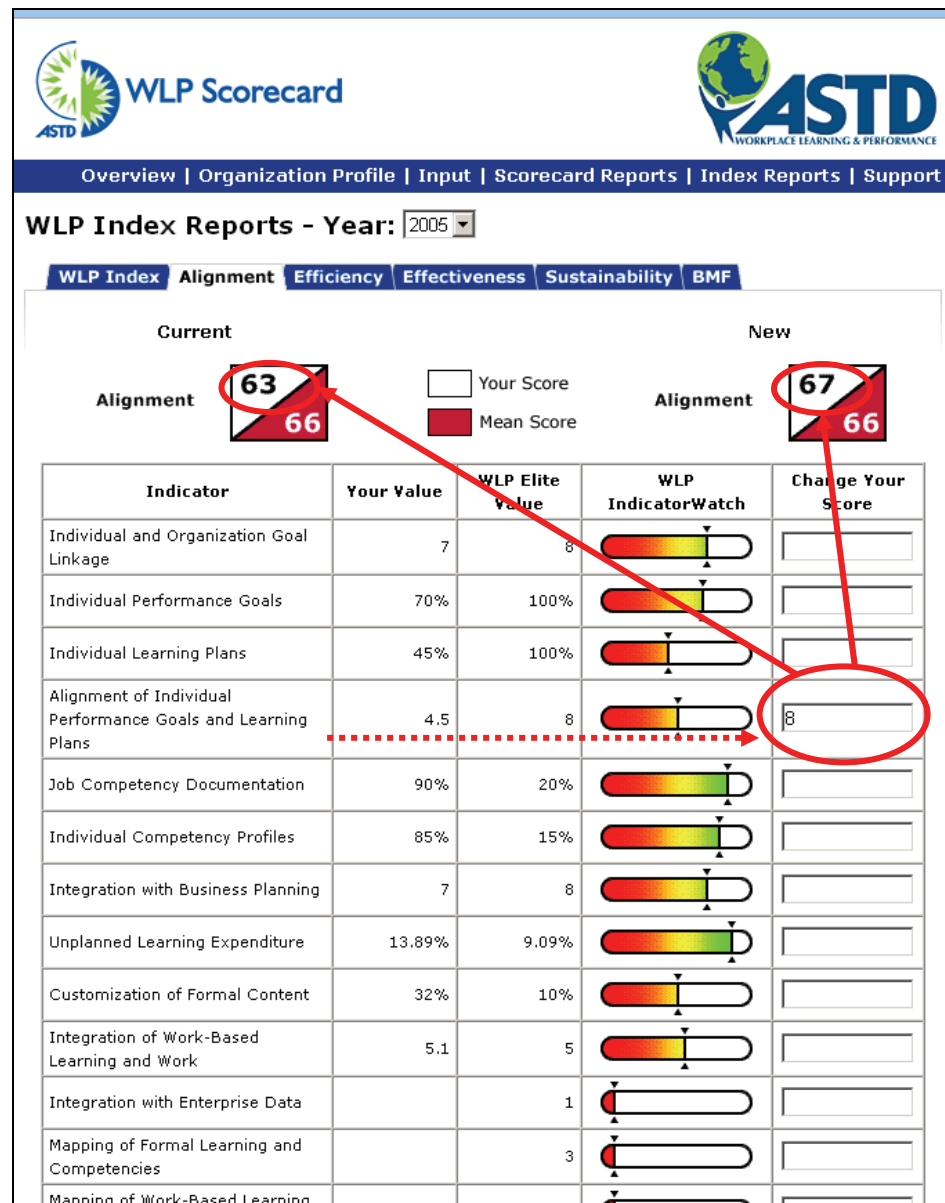
Step 2 Select the Alignment, Efficiency, Effectiveness, or Sustainability tab. Your Index Score will appear in a square graphic to the left, along with the mean score for all organizations in the Scorecard database. All indicators contributing to the index score appear in a table, with an indicator value for your organization, and the WLP Elite value – the mean indicator value of the top-scoring organizations in the Scorecard database.

Step 3 Review the WLP IndicatorWatch assigned to each indicator. The WLP IndicatorWatch is a gauge showing your organization's strength in each indicator. If the gauge indicates the **red**-shaded area, it denotes an indicator that is **substantially and negatively** impacting your index score. Likewise, if it indicates the **yellow**-shaded area, it denotes an indicator that is **moderately and negatively** impacting your index score. Finally, a gauge indicating the **green**-shaded area denotes an indicator that **strengthens** your index score.



PERFORM SENSITIVITY ANALYSIS

You can also **perform a sensitivity analysis** by modifying scores on all the indicators to determine what effect a different set of indicator scores would have on your index score. Enter a new value in the column “Change Your Score” corresponding to a particular indicator. When you click outside the box in which you just entered the new value, your Index Score will change in the “New” square graphic. Using this feature, you can experiment with scores on any or all indicators to see what effect a different set of indicator values would have on your Index Score.



WLP Scorecard

Input Definitions

WORKPLACE INPUTS

Workforce

Workforce Size

Average total number of workers across all months in the year. If your organization is a bank, you may alternatively enter an end-of-year figure. Employees include: all employees of consolidated domestic and international subsidiaries; all part-time and seasonal employees; all employees classified by an FTE basis; corporate officers. Exclude contracted workers and consultants, board members, and employees of unconsolidated subsidiaries. Enter as FTE. Source: HRIS.

Workforce Composition

Enter the number of workers for each employee group:

- Executives and Senior Managers (VP level or above)
- Middle Managers (Director level)
- First-line supervisors
- Production/Technical
- Administrative
- Customer Service
- Sales
- IT
- Other

Source: HRIS.

Hourly Employees

Number of employees classified as non-exempt, non-salaried, or hourly. Enter as FTE.

Employees Outside Home Country

Percentage of employees who perform more than 50 percent of their duties outside country of headquartering.

Workforce Dispersion

Number of countries with employees outside the country of headquartering.

Workforce Education Level

Average number of years of college/higher education of employees. Enter as a number using the following degree attainment guidelines:

- Associate-level: 1-2 years
- Bachelor-level: 4-5 years
- Masters-level: 5-7 years
- MD/JD: 7-10 years
- Doctoral-level: 7-12 years.

Source: HRIS.

Compensation

Payroll

Salary and wages, not including benefit plans and taxes.
Source: HR or Finance departments.

Total Compensation

Total compensation reflects the costs of employees' wages and benefits allocated to the continuing operations of your organization. Total compensation includes salary and wages, benefit plans, payroll taxes, pension costs, bonuses, incentive compensation, profit sharing, and commissions. Source: HR or finance departments; annual report.

Talent Management

Turnover

Percentage of employees that separated permanently from the organization, include voluntarily, involuntarily, and due to retirement. Source: HRIS

Tenure

Overall average number of years that employees have remained employed by the organization. Source: HRIS

Promotions

Number of promotions of persons already employed by your organization; internal promotions. Source: HRIS.

New Hires

Number of employees hired who were not employed by your organization in their immediately previous job. Source: HRIS.

Job Competency Documentation

Percentage of jobs/roles for which critical competencies/skills have been documented. Source: HR and business unit leaders.

Individual Competency Profiles

Percentage of employee job classifications with competency profiles.

Succession Planning

Percentage of key positions or roles for which at least one successor has been identified.

Performance Management***Individual and Organization Goal Linkage***

Extent to which individual performance goals are linked to organizational goals. Enter a number from 0 to 10, using the following scale as a guideline -- 0: completely unlinked, 1-2: minimal linkage, 3-4: moderately low linkage, 5: moderate linkage, 6-7: moderately high linkage, 8-9: high linkage, 10: maximal linkage.

Individual Performance Goals

Percentage of employees whose job specification includes performance goals/plans and annual performance reviews.

Individual Learning Plans

Percentage of employees whose job specifications include individual learning/development plans.

Alignment of Individual Performance Goals and Learning Plans

Extent to which individual employee development plans are aligned with individual performance goals. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete disjoint/no alignment, 1-2: minimal alignment, 3-4: moderately low alignment, 5: moderate alignment, 6-7: moderately high alignment, 8-9: high alignment, 10: complete alignment with no exceptions.

Employee Engagement***Employee Alignment with Culture/Values***

Employee adoption/assumption of organization culture and values. Source: Perceptions of executives and business leaders. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete lack of adoption, 1-2: minimal adoption, 3-4: moderately low adoption, 5: moderate adoption, 6-7: moderately high adoption, 8-9: high adoption, 10: complete adoption.

Employee Satisfaction

Average employee satisfaction with the general work environment of the organization. Source: Annual employee survey. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction. (Note: If using data from the Annual employee survey as a basis, 0=0% satisfied, 1=10% satisfied, 2=20% satisfied, etc.)

Employee Satisfaction with Learning Opportunities

Employee satisfaction with opportunities to learn and develop job- or career-related skills and abilities. Source: Annual employee survey. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction. (Note: If using data from the Annual employee survey as a basis, 0=0% satisfied, 1=10% satisfied, 2=20% satisfied, etc.)

Absenteeism

Average number of days absent due to illness or unexplained per employee. Source: HRIS.

Innovation**Investment in R&D**

Dollar amount invested in the development of new products or services. Includes: organization-sponsored research and development, acquired research and development when reported as a separate item, software development expense, and research and development expenses from continuing operations, in the case of organizations whose primary business activity is research and development. Do not include: prospective or extractive activities; client-supported research and development or software expenses, royalties, market research and testing, acquired technology or software (including amortization), engineering and support expenses, and research and development from discontinued operations. Source: Finance department; annual report. Enter as U.S. dollars. Convert non-U.S. currency using rate on date of entry.

New Products and Services

Percentage of products and services in current portfolio that were newly introduced within the last year. Source: Marketing Department.

Employee Time on New Products and Services

Percentage of employee time on products and services in current portfolio that were newly introduced within in the last year. Aggregate across organization and take average. Enter as percentage. Source: Perceptions of executives and senior leaders.

Employee Time on Process Improvement/Innovation

Percentage of employee time on organizational processes of any type that were newly introduced within the last year. Aggregate across organization and take average. Enter as percentage. Source: Perceptions of executives and senior leaders.

Employee Idea Solicitation

Existence of a formal process for employees to suggest innovations in business processes, products or services. Enter as Yes or No.

Employee Idea Conversion

Amount of employee-generated ideas for innovation that are realized. This may include ideas for product or service improvement/enhancement, internal process improvement, and new or improved production or delivery techniques. Source: HR department or business unit leaders. To enter a figure, divide the number of ideas from employees realized this year by number of ideas submitted this year.

Number of Patents Applied For

Number of patent applications filed.

Number of Patents Received

Number of patents received.

Total Patents

Total number of unexpired patents owned by the organization.

Industry/University Partnerships

Number of cooperation agreements with universities and/or business schools. Cooperation agreements can include formal knowledge sharing agreements, licensing agreements, research-to-industry programs, etc., but do not include formal employee recruiting.

LEARNING INPUTS

Investment

Total Direct Learning Investment

Total direct costs for learning, including formal learning, work-based learning, and learning function's contribution to non-learning performance improvement solutions.

Formal Learning comprises structured learning activities that are conducted separate from work, for example an online lesson, a classroom event, or a coaching event conducted separately from work.

Work-based Learning refers to activities embedded in, or coincident to an employee's normal work activity, including use of knowledge repositories, job aids, knowledge sharing, and coaching while doing work tasks.

Non-learning solutions include time that learning staff are involved in performance improvement activities such as organizational development, process analysis, talent management, and performance management.

Direct costs for the learning function include

- Learning and performance staff salaries (gross wages without benefits or employer-paid taxes)
- Travel costs for learning and performance staff
- Administrative costs
- Non-salary development costs
- Non-salary delivery costs (classroom facilities, online infrastructure, etc.)
- Outsourced activities
- Tuition reimbursements.

Direct costs do not include

- Learners' travel expenses
- Costs of participants' conference attendance, fees, and travel
- Cost of lost work time while engaged in learning formal activities
- Costs of internal subject matter experts' time for content analysis, coaching, and knowledge sharing.

Total Indirect Learning Investment

Total indirect costs for learning. Include costs related to formal and work-based only.

Indirect costs for learning include

- Learners' travel expenses
- Participants' conference attendance, fees, travel, lodging, meals, and ground transportation
- Lost work time while engaged in learning formal activities
- Internal subject matter experts' time for content analysis, coaching, and knowledge sharing.

Percentage of Direct Cost for Learning by Type of Solution

Percentage of direct learning expenditure devoted to formal learning, work-based learning, and activities related to non-learning performance improvement solutions

Formal Learning

Work-Based Learning

Non-Learning Solutions

Integration with Business Planning

Extent of integration of learning requirements and budget planning with business planning process. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no integration, 1-2: minimal integration, 3-4: moderately low integration, 5: moderate integration, 6-7: moderately high integration, 8-9: high integration, 10: full integration with no exceptions.

Unplanned Learning Expenditure

Difference between year-end total learning expenditure and budgeted learning expenditure. Include formal, work-based learning, and non-learning solution expenditures; budget variance between planned and actual year-end learning expenditures. Enter in US dollars

Budget Centralization

Percentage of total direct learning expenditure (i.e., formal and work-based learning, and non-learning solutions) managed centrally.

External Services Expenditure

Percentage of total direct learning expenditure for external services. Include consultants and consultant services, content development and licenses, and workshops and training programs delivered by external providers. Do not include tuition reimbursement for educational programs at educational institutions.

Tuition Reimbursement Expenditure

Percentage of total direct learning expenditure for tuition reimbursement for educational programs at educational institutions.

Learning Staff Costs (including benefits and taxes)

Percentage of total direct learning expenditure for learning staff. Include total salary and wages, benefits, and taxes.

Learning Staff Costs (excluding benefits and taxes)

Percentage of total direct learning expenditure for learning staff. Include salary and total wages only. Do not include benefits and taxes.

Expenditure on Technology Infrastructure

Percentage of total direct learning expenditure for technology infrastructure. Include hardware, software, licenses, consulting fees, maintenance, implementation costs, and management costs. Include any amortization costs borne directly or charged to the learning budget. If technology infrastructure belongs to another department's budget, include only the portion allocated to the learning function.

Expenditure by Employee Groups

Percentage of total direct learning expenditure for different employee groups. Total should equal 100%.

- Senior managers
- Middle managers
- First line supervisors
- Production/Technical
- Administrative
- Customer Service
- Sales
- IT
- Other

Learning Function Staff/Talent***Learning Staff Size***

Total number of learning staff in your organization. Include rotated staff only if having an FTE allocation to the learning function. Enter as FTE.

Learning Staff Allocation by Activity

Number of internal learning staff (FTE) dedicated to the following activities

- Administration (learning management, program/project management, finances)
- Needs Analysis/Planning/Requirements/Performance Analysis/Competency Modeling
- Task Analysis/Content Analysis
- Design (including templates, content structures, activities, information scripts, interfaces)
- Development
- Content Maintenance
- Delivery
- Measurement and Evaluation.

Learning Staff Reporting

Percentage of learning staff reporting to central learning function. Include rotated staff only if having an FTE allocation to the learning function.

Learning Staff Turnover

Percentage learning staff that left the organization. Include voluntary and involuntary separations, and retirements. Do not include rotating staff having an FTE allocation to the learning function. Enter as FTE.

Learning Staff Tenure

Average number of years learning staff have been with the company. Include rotated staff only if having an FTE allocation to the learning function.

Learning Staff Education Level

Average years of college/higher education of learning staff. Enter number of years of college education of each learning staff person divided by number of learning staff.

Learning Function Processes

Learning Staff Time Allocation by Activity

Percentage of total learning staff time spent on the following activities. Total should equal 100%.

- Administration (Learning Management, Program/Project Management, Finances)
- Needs Analysis/Planning/Requirements/Performance Analysis/Competency Modeling
- Task Analysis/Content Analysis
- Design (including templates, content structures, activities, information scripts, interfaces)

- Development
- Content Maintenance
- Delivery
- Measurement and Evaluation

Learning Staff Time Allocation by Type of Solution

Percentage of learning staff time allocated to learning, work-based learning, and non-learning performance improvement solutions

Formal Learning

Work-Based Learning

Non-Learning Solutions

Standardization

Extent to which learning function processes are standardized across the organization. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no standardization, 1-2: minimal standardization, 3-4: moderately low standardization, 5: moderate standardization, 6-7: moderately high standardization, 8-9: high standardization, 10: full standardization with no exceptions.

Documentation

Extent to which the learning function processes and standards are documented. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no documentation, 1-2: minimal documentation, 3-4: moderately scarce documentation, 5: moderate documentation, 6-7: moderately frequent documentation, 8-9: highly frequent documentation, 10: complete documentation.

Automation

Extent to which the learning function processes are automated, such as administration or content updating. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no automation, 1-2: minimal automation, 3-4: moderately low automation, 5: moderate automation, 6-7: moderately high automation, 8-9: high automation, 10: complete automation.

Responsiveness

Shortest cycle: Shortest amount of time required to design, develop and deploy one hour of formal content (e.g., an hour of primarily informational e-learning content). Enter as number of days. If less than one day, enter as fraction of one day.

Longest cycle: Longest amount time required to design, develop and deploy one hour of formal content (e.g., to develop a certification program or simulation). Enter as number of days. If less than one day, enter as fraction of one day.

Output (Formal Learning)

Total Formal Hours Available

Total number of hours of formal learning content available (one time count). Include all available hours of all formal learning content available for employee use: live classes, workshops, seminars, online course catalog, video, and print. Enter as number of hours.

New Formal Hours

Total number of hours of new formal learning content made available this year (one time count). Include all available hours of all formal learning content available for employee use: live classes, workshops, seminars, online course catalog, video, and print. Enter as number of hours.

Updated Formal Hours

Total number of hours of existing formal content that have been updated this year (one time count).

Formal Hours Retired

Total number of hours of formal content that have been rendered inactive, and are no longer available for use by employees. Include all formal content, whether archived or disposed of.

Formal Hours by Content Area

Formal learning content distribution by skill area. Enter percentage of formal learning hours available by content area. Total should equal 100%.

- Executive Development
- Managerial and Supervisory
- Sales (not including Product Knowledge)
- Customer Service
- Mandatory and Compliance (e.g., Safety, Security)
- Processes, Procedures, Business Practices, and Quality
- Information Technology and Systems (e.g., Enterprise and Desktop Software)
- Interpersonal Skills (e.g., Communication, Team Work)
- New Employee Orientation
- Basic Skills
- Profession-Specific or Industry-Specific (e.g., Engineering, Accounting, Legal, Medical)
- Product Knowledge
- Other

New Formal Hours by Content Area

Newly introduced formal learning content distribution by skill area. Enter percentage of formal learning hours available that were newly introduced this year by content area

- Executive Development
- Managerial and Supervisory
- Sales (not including Product Knowledge)
- Customer Service
- Mandatory and Compliance (e.g., Safety, Security)
- Processes, Procedures, Business Practices, and Quality
- Information Technology and Systems (e.g., Enterprise and Desktop Software)
- Interpersonal Skills (e.g., Communication, Team Work)
- New Employee Orientation
- Basic Skills
- Profession-Specific or Industry-Specific (e.g., Engineering, Accounting, Legal, Medical)
- Product Knowledge
- Other.

Formal Hours by Delivery Method

Percentage of formal learning hours available via different delivery methods. Total should equal 100%.

- Live instructor-led real classroom
- Live instructor-led virtual (online) classroom
- Live instructor-led remote, but not online (e.g., satellite, video conference, teleconference)
- Self-paced online (networked)
- Self-paced stand-alone (non-networked) computer-based (i.e., CD-ROM)
- Mobile Technology (e.g., PDA, MP3, cell phone)
- Technology other than computer and mobile (e.g., videotape, audio CD)
- Self-paced non-technology delivered (i.e., print)
- Other

Customization of Formal Content

Percentage of formal learning hours available that are customized for your organization. Include hours of existing formal learning content that have been adapted for your organization, and templated formal learning content created uniquely and exclusively for your organization. Customized learning content contrasts with generic "off-the-shelf" content from external providers.

Output (Work-Based Learning)

Knowledge Repositories

Total hours of non-course based, searchable, informational content created, maintained, or sponsored by the learning function.

New Hours of Expert Knowledge Entered into Repositories

Total new hours of expert knowledge that have been captured and entered into knowledge repositories, and are available for search and use by other employees in your organization.

Knowledge Sharing

Number of hours of knowledge sharing planned, sponsored, or facilitated primarily by the learning function.

Infrastructure

Maturity of Management of Formal Learning

Maturity of system for managing formal learning within your organization. Enter a number from 0 to 10, using the following scale as a guideline -- 0: nascent/just born 1-2: minimal maturity/infant stage, 3-4: moderately low maturity, childhood stage, 5-moderate maturity/adolescent stage, 6-7: moderately high maturity/young adult stage, 8-9: high maturity/adult stage 10: completely mature/seasoned adult stage.

Maturity of Work-based Learning Infrastructure

Maturity of system for managing work-based learning, including knowledge repositories and knowledge sharing, within your organization. Enter a number from 0 to 10, using the following scale as a guideline -- 0: nascent/just born 1-2: minimal maturity/infant stage, 3-4: moderately low maturity, childhood stage, 5-moderate maturity/adolescent stage, 6-7: moderately high maturity/young adult stage, 8-9: high maturity/adult stage 10: completely mature/seasoned adult stage.

Infrastructure Standardization

Extent to which systems for managing learning are consistent across the organization. Enter a number from 0 to 10, using the following scale as a guideline -- 0: completely inconsistent, 1-2: minimal consistency, 3-4: moderately low consistency, 5-moderate consistency, 6-7: moderately high consistency, 8-9: high consistency, 10: complete consistency with no exceptions.

Measurement Maturity

Maturity of system for collecting, analyzing, and reporting on the performance of the learning function in your organization. Enter a number from 0 to 10, using the following scale as a guideline -- 0: nascent/just born 1-2: minimal maturity/infant stage, 3-4: moderately low maturity, childhood stage, 5- moderate maturity/adolescent stage, 6-7: moderately high maturity/young adult stage, 8-9: high maturity/adult stage 10: completely mature/seasoned adult stage.

Outsourcing**Number of Providers**

Total number of current external providers that provide any goods or services to your organization's learning function.

Longevity of Relationships

Average number of years current providers have been retained. Add number of years with each current provider and divide by number of providers.

Management of External Providers

Percentage of outsourced services managed centrally.

Learning Activities Outsourced

Enter percentage of each learning activity that is outsourced

- Planning, analysis, competency modeling
- Content design, development, acquisition, maintenance, and delivery
- Learning Management/Administration
- Measurement and evaluation
- Infrastructure
- Other.

Integration**Formal and Work-Based Learning**

Extent of integration of formal and work-based learning opportunities. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no integration, 1-2: minimal integration, 3-4: moderately low integration, 5: moderate integration, 6-7: moderately high integration, 8-9: high integration, 10: full integration with no exceptions.

Work-Based Learning and Work

Extent to which knowledge repository access and knowledge sharing opportunities are embedded in workflow. Enter a number from 0 to 10, using the following scale as a guideline -
- 0: no embeddedness, 1-2: minimal embeddedness, 3-4: moderately low embeddedness, 5: moderate embeddedness, 6-7: moderately high embeddedness, 8-9: high embeddedness, 10: full embeddedness.

Enterprise Data

Integration of learning databases with other enterprise databases. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no integration, 1-2: minimal integration, 3-4: moderately low integration, 5: moderate integration, 6-7: moderately high integration, 8-9: high integration, 10: full integration with no exceptions.

Formal Learning and Competencies

Extent of mapping of formal learning opportunities to job/role competencies, e.g. in LMS. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no mapping, 1-2: minimal mapping, 3-4: moderately low mapping, 5: moderate mapping, 6-7: moderately high mapping, 8-9: high mapping, 10: full mapping.

Work-Based Learning and Competencies

Extent of mapping of work-based learning opportunities to job/role competencies, e.g. in LMS. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no mapping, 1-2: minimal mapping, 3-4: moderately low mapping, 5: moderate mapping, 6-7: moderately high mapping, 8-9: high mapping, 10: full mapping.

Formal Learning and Individual Learning Plans

Extent of mapping of formal learning opportunities to individual employee competency gaps/learning needs, e.g. in LMS. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no mapping, 1-2: minimal mapping, 3-4: moderately low mapping, 5: moderate mapping, 6-7: moderately high mapping, 8-9: high mapping, 10: full mapping.

Work-Based Learning and Individual Learning Plans

Extent of mapping of work-based learning opportunities to individual employee competency gaps/learning needs, e.g. in LMS. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no mapping, 1-2: minimal mapping, 3-4: moderately low mapping, 5: moderate mapping, 6-7: moderately high mapping, 8-9: high mapping, 10: full mapping.

Usage (Formal Learning)

Formal Hours Used

Total formal learning hours accessed or completed. Multiply the number of hours available by the number of employees who accessed or completed the learning content. For example, if 100 employees participated in an 8 hour workshop on project management, the total hours received is 800, but the total hours available is 8.

Formal Hours Used by Employee Group

Formal learning hours accessed or completed according to employee group. Add total hours across all content for each employee group. Enter as total number of hours for each employee group.

- Executives and Senior Managers
- Middle Managers
- First Line Supervisors
- Production/Technical
- Administrative
- Customer Service
- Sales
- IT
- Other

Formal Hours Used by Delivery Method

Percentage of formal learning hours accessed or completed according delivery medium. Total should sum to 100%

- Live instructor-led real classroom
- Live instructor-led virtual (online) classroom
- Live instructor-led remote, but not online (e.g., satellite, video conference, teleconference)
- Self-paced online (networked)
- Self-paced stand-alone (non-networked) computer-based (i.e., CD-ROM)
- Mobile Technology (e.g., PDA, MP3, cell phone)
- Technology other than computer and mobile (e.g., videotape, audio CD)
- Self-paced non-technology delivered (i.e., print)
- Other

Usage (Work-Based Learning)

Knowledge Repository Access

Total number of requests to knowledge repositories that are created/maintained by the learning function.

Knowledge Repository Time

Total time employees spent viewing knowledge repository content; total time logged by all employees in all online knowledge repositories that are created/maintained by the learning function. Enter as number of hours.

Knowledge Repository Time by Employee Group

Time spent viewing knowledge repository content by employee group. Enter as total number of hours logged for each employee group.

- Executives and Senior Managers
- Middle Managers
- First Line Supervisors
- Production/Technical
- Administrative
- Customer Service
- Sales
- IT
- Other

Knowledge Sharing Time as a Novice

Average number of hours spent per employee as recipient in knowledge sharing, including participation in communities of practice, expert consultation, and coaching.

Knowledge Sharing Time as an Expert

Average number of hours spent per employee as provider in knowledge sharing, including participation in communities of practice, expert consultation, and coaching.

Time on Challenging Work Assignments

Average percentage of employee time spent on challenging work assignments, deliberately assigned as a learning opportunity.

Time on Other Discretionary Learning

Average number of employee hours spent on unstructured, self-directed learning activities, including internet/intranet searches, external bulletin board participation, participation in online user groups, review of journals or trade publications, and accessing online libraries or information databases.

PERFORMANCE INPUTS

Capability

Competence Gap

Extent of gap between current and desired competence levels to meet current business needs. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no gap, 1-2: minimal gap, 3-4: moderately low gap, 5: moderate gap, 6-7: moderately high gap, 8-9: high gap, 10: complete disjoint. (Note: May want to use some measures from Annual employee survey, such as knowledge of job, etc. as general guides for this input.)

Human Capital Readiness

Extent of gap between current competence and desired competence for future business needs. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no gap, 1-2: minimal gap, 3-4: moderately low gap, 5: moderate gap, 6-7: moderately high gap, 8-9: high gap, 10: complete disjoint.

Reduction in time to Competence/Performance

Average percentage reduction in total hours of time to competence/desired proficiency across all employee groups. Source: Business unit leader perceptions.

Productivity

Individual Productivity Improvement

Improvement in individual output across all employees. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no improvement, 1-2: minimal improvement, 3-4: moderately low improvement, 5: moderate improvement, 6-7: moderately high improvement, 8-9: high improvement, 10: maximal improvement. (Note: May want to use revenue per employee and other productivity measures as general guides for this input.)

Business Unit Productivity Improvement

Improvement in business unit productivity across all business units. Enter a number from 0 to 10, using the following scale as a guideline -- 0: no improvement, 1-2: minimal improvement, 3-4: moderately low improvement, 5: moderate improvement, 6-7: moderately high improvement, 8-9: high improvement, 10: maximal improvement. (Note: May want to use revenue per employee and other productivity measures as general guides for this input.)

Business Outcomes

Customer Satisfaction

Average overall customer satisfaction with quality and consistency of products and services. Source: Customer satisfaction surveys. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction. (Note: If using data from Customer satisfaction surveys as a basis, 0 = 0% satisfied, 1 = 10% satisfied, 2 = 20% satisfied, etc.)

Revenue

Total revenue generated by the business; include all recognized customer, operating, investment, rent, and accrued unbilled revenue. *For governmental organizations:* enter budget. Enter in actual US dollars. Source: Finance department; annual report.

Income/Profit

Net profit (or income) before taxes. Subtract the sum of expenses and losses from the sum of revenues and gains. Include any effects related to discontinued operations, extraordinary items, total income taxes, and minority interest. Do not include payments of stock dividends as expenses. Enter in actual US dollars. **For banks:** include securities gains and losses. **For governmental organizations:** enter 0. Source: Finance department; annual report.

Revenue from New Products and Services

Revenue from products and services newly introduced in the past year. Include all recognized customer, operating, investment, rent, and accrued unbilled revenue.

Organizational Readiness

Readiness for future organizational and market changes. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete unreadiness, 1-2: minimal readiness, 3-4: moderately low readiness, 5: moderate readiness, 6-7: moderately high readiness, 8-9: high readiness, 10: maximal readiness. (Note: May want to use some measures from Annual employee survey, such as knowledge of marketplace, etc. as general guides for this input.)

Perceptions

C-Level Satisfaction

CXO and senior executives' satisfaction with the learning function's performance. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction.

Business Unit Leader Satisfaction

Business unit leader/manager satisfaction with learning function activities provided for their department/division. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction. (Note: May be able to obtain from Annual employee survey as a basis, in which use 0 = 0% satisfied, 1 = 10% satisfied, 2 = 20% satisfied, etc.)

Learner Satisfaction (Formal)

Learner satisfaction with formal learning opportunities (classroom; online courses). Average across all programs. Source: Annual employee survey or Level 1 learning program assessments. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction. (Note: If using data from Annual employee survey as a basis, 0 = 0% satisfied, 1 = 10% satisfied, 2 = 20% satisfied, etc.)

Learner Satisfaction (Work-Based)

Learner satisfaction with work-based learning opportunities (coaching, knowledge sharing, reference content, access to experts). Average across all opportunities. Source: Annual employee survey. Enter a number from 0 to 10, using the following scale as a guideline -- 0: complete dissatisfaction 1-2: minimal satisfaction, 3-4: moderately low satisfaction, 5: moderate satisfaction, 6-7: moderately high satisfaction, 8-9: high satisfaction, 10: complete satisfaction. (Note: If using data from Annual employee survey as a basis, 0 = 0% satisfied, 1 = 10% satisfied, 2 = 20% satisfied, etc.)

WLP Scorecard Indicators

FINANCIAL INDICATORS

Expenditure (Total) per Employee
Expenditure (Total Direct) per Employee
Expenditure (Direct Formal) per Employee
Expenditure (Direct Work-Based) per Employee
Expenditure (Direct Formal) as Percentage of Payroll (Without Taxes and Benefits)
Expenditure (Total) As Percentage of Total Compensation
Expenditure (Total) As Percentage of Payroll
Expenditure (Total) As Percentage of Revenue
Expenditure (Total) As Percentage of Income/Profit
Percentage of Direct Expenditure on External Services
Percentage of Direct Expenditure on Tuition Reimbursement
Percentage of Direct Expenditure by Type of Solution
Percentage of Direct Expenditure on Technology Infrastructure
Percentage of Direct Expenditure on Learning Staff (Including Benefits/Taxes)
Percentage of Direct Expenditure on Learning Staff (Excluding Benefits/Taxes)
Expenditure by Employee Groups
Direct Cost per Formal Learning Hour Available
Direct Cost per Formal Learning Hour Used
Direct Cost per Hour of Work-Based Learning Used

OPERATIONS INDICATORS

Integration of Learning Requirements and Business Planning Process
Ratio of Employees to Learning Staff
Centralization of Learning Staff
Centralization of Learning Budget
Education Level of Learning Staff
Turnover of Learning Staff
Tenure of Learning Staff
Learning Staff Activity Allocation by Activity
Learning Staff Time Allocation by Activity
Learning Staff Time Allocation by Type of Solution
Hours of Formal Content Available per Learning Staff Member
Hours of Formal Content Usage per Learning Staff Member

CUSTOMER INDICATORS

Hours of Work-Based Learning Usage per Learning Staff Member
 Knowledge Repository Usage per Learning Staff Member
 Hours of Knowledge Sharing Planned/Facilitated per Learning Staff Member
 Formal Learning Content Reuse Ratio
 Knowledge Repository Reuse Ratio
 Standardization of Processes
 Documentation of Processes
 Automation of Processes
 Customization of Formal Content
 Responsiveness of the Learning Function
 Number of External Learning Service Providers
 Longevity of Relationships with External Providers
 Learning Activities Outsourced
 Formal Hours of Learning Available per Employee
 New Formal Hours Available per Employee
 Percentage of Formal Hours Updated
 Percentage of Formal Hours Retired
 Formal Learning Hours Available by Content Area
 New Formal Learning Hours Available by Content Area
 Formal Hours Available by Delivery Method
 Formal Learning Hours Used by Delivery Method
 Mapping of Formal Learning to Job Competencies
 Mapping of Work-Based Learning to Job Competencies
 Mapping of Formal Learning to Employee Learning Needs
 Mapping of Work-Based Learning to Employee Learning Needs
 New Hours of Knowledge Repository Content per Employee
 Integration of Learning Databases with Other Enterprise Databases

 Formal Learning Usage per Employee
 Formal Learning Usage by Employee Group
 Work-Based Learning Usage per Employee
 Knowledge Repository Usage per Employee
 Knowledge Repository Usage by Employee Group
 Knowledge Sharing Usage per Employee
 Challenging Work Assignment Usage
 Discretionary Learning per Employee
 C-Level Satisfaction with Learning Function
 Business Unit Leader Satisfaction with Learning Function
 Overall Employee Satisfaction
 Employee Satisfaction with Learning Opportunities
 Learner Satisfaction with Formal Learning
 Learner Satisfaction with Work-Based Learning

INNOVATION INDICATORS

Percentage of All Learning Usage That Is Work-Based
Ratio of Knowledge Repository Content to Formal Learning
Content
Integration of Learning with Work
Integration of Formal and Work-Based Learning
Percentage of Formal Learning Delivered online
Automation of Learning Function Processes
Percentage of Learning Staff Time Spent on Non-Learning
Solutions
Number of Hours of Knowledge Sharing Planned/Facilitated per
Learning Staff
Maturity of System for Collecting, Analyzing and Reporting Data
Maturity of System for Managing Formal Learning
Maturity of System for Managing Work-Based Learning
Infrastructure Standardization Across the Enterprise

WLP Scorecard

Index Indicators

ALIGNMENT INDEX INDICATORS

Individual and Organization Goal Linkage

One of the fundamental components of alignment, individual and organizational goal linkage requires diligent and ongoing formative evaluation. High levels of individual and organizational goal linkage increase the likelihood that learning programs will reach desired objectives, and that the contribution of the learning function in reaching desired objectives becomes visible.

Individual Performance Goals

Assisting individual employees in meeting their performance goals is a critical objective of learning programs, and serves as an intermediate step in aligning a learning program for assuring maximal impact on organizational and strategic goals.

Individual Learning Plans

Constructing individual learning plans for all employees is a major task. Yet the higher the number of employees having individual learning plans, the more likely these employees have entered into the scope and reach of the learning function. Consequently, individual learning plans can both denote the level of penetration of the learning function within the organization, and predict the likelihood of successfully encompassing employees not yet adequately reached by the learning function.

Alignment of Individual Performance and Learning Plans

One of the fundamental components of alignment, high linkage of individual performance and learning plans assures that learning programs support measurable and tangible performance objectives. Additionally, high linkage can create greater visibility for the learning function at the strategic phase, thereby supporting greater alignment.

Job Competency Documentation

A substantial task for any organization, adequate job competency documentation nevertheless allows learning executives to better understand and manage their skills inventory, which can facilitate precise skills deployment when a learning goal is determined. High levels of job competency documentation indicate maturity in the learning function.

Individual Competency Profiles

Constructing individual competency profiles can be an even more laborious task than constructing individual learning plans. Yet organizations having a high number of individual competency profiles benefit from an enhanced ability to assemble and manage a skill inventory, and provide staffing and learning programs that better meet the strategic objectives supported by learning programs. Such precise levels of alignment are highly sought after by many learning executives.

Integration with Business Planning

Any business function or process that is not tied to fundamental business planning has a low chance of enduring more than one business cycle, and the learning function is no exception. The learning function that maintains close ties with business planning is less vulnerable to resource reallocations, or catastrophic budget reductions, and consequently more aligned. High levels of integration with business planning also indicate assimilation of the learning function by senior management.

Unplanned Learning Expenditure

Unplanned learning expenditures are often a reliable indication that misalignment is occurring within the organization. Unplanned learning expenditures frequently point to redundant learning efforts, and may illuminate "rogue" activity within the organization. A low amount of unplanned learning expenditures suggests adequate front-end alignment, and careful management of the learning budget.

Customization of Formal Content

Customization of formal content not only describes the level of adaptability of the learning function, but the degree to which formal learning has been designed to be adaptable. Both features contribute to increasing alignment of the learning function.

Integration of Work-Based Learning and Work

A fundamental component of alignment, a high level of embeddedness of work-based learning in the actual workplace can indicate successful adaptation of work-based learning programs to organizational objectives, and seamlessness between work-based learning activities and actual work activities.

Integration with Enterprise Data

Integration with enterprise data indicates the degree to which the learning function has achieved visibility in the highest levels of the organization. The learning function whose effects are tied to results beyond the learning function will be more highly aligned with the larger organization than a learning organization that simply produces "learning products."

Mapping of Formal Learning and Competencies

The results of a successful formal learning program often include enhancement of an organization's skills inventory. Learning functions that make the effort to increase this important, yet often intangible organizational asset, and can demonstrate success in doing so, will often be more highly aligned with the larger organization.

Mapping of Work-Based Learning and Competencies

The results of a successful work-based learning program often include enhancement of an organization's skills inventory, and encourages senior management to consult the learning function when attempting to improve some aspect of the workplace.

Mapping of Formal Learning and Individual Learning Plans

The evaluation stages of successful formal learning programs often reveal information about individual learner characteristics, and how those characteristics could be developed to the maximal benefit of the organization. Learning functions that make the effort to feed such knowledge back into individual learning plans will often be more highly aligned with the larger organization.

Mapping of Work-Based Learning and Individual Learning Plans

As with formal learning programs, the evaluation stages of successful work-based learning programs often reveal information about individual learner characteristics, and how those characteristics could be developed to the maximal benefit of the organization. Learning functions that make the effort to feed such knowledge back into individual learning plans will often be more highly aligned with the larger organization.

Employee Satisfaction with Learning Opportunities

Employee satisfaction with learning opportunities is a common indicator of many desirable workplace conditions. High levels of employee satisfaction with learning opportunities is useful in determining how well the learning function aligns broadly with the larger organization, and how well individual employee performance contributes to efforts to align the learning function to workplace performance objectives.

C-Level Satisfaction

A high level of already existing C-level satisfaction is critical in assuring alignment at the outset of any learning program. Yet as learning strategy becomes crafted and executed, communication by senior management of their requirements of the learning function, and their criteria for judging the effect of learning programs on organizational objectives are both fundamental elements in maintaining their satisfaction.

Business Unit Leader Satisfaction

Business unit leaders assume substantial accountability for their decisions to invest in learning programs for their lines of business, and usually have first-hand knowledge of whether a learning program is achieving desired results. Business unit leaders in essence are the customers of the learning function, and their satisfaction frequently determines whether learning investments will continue in the future, and whether the learning function will increase its influence within that business unit.

Learner Satisfaction (Formal)

Although there is no consensus about whether it is always a reliable indicator of alignment, high learner satisfaction is nevertheless closely related to learners' successfully meeting performance goals, as well as favorable perceptions of how relevant formal learning programs are helping them fulfill performance expectations.

Learner Satisfaction (Work-Based)

Likewise, although there is no consensus about whether it is always a reliable indicator of alignment, high learner satisfaction is closely related to learners' successfully meeting performance goals, as well as favorable perceptions of how relevant work-based learning programs are in helping them fulfill performance expectations. Additionally, high learner satisfaction with work-based learning, and about the workplace in general, sometimes feed back into one another, creating incentives among learners to maximize their work-based learning experiences.

Percentage of Formal Hours Updated

Alignment refers not only to the rectification of the learning function to strategic objectives at the front-end, but also the adaptability of the learning function to the evolution of the organization, particularly as strategy becomes implemented throughout the organization.

Percentage of Formal Hours Retired

Retired learning content indicates a vigorous and aligned learning function that has created learning products that have been successfully implemented and ultimately consumed.

EFFICIENCY INDEX INDICATORS

Year to Year Efficiency Gain

Year to year efficiency gain refers to a likelihood of sustained and continuous improvement of the output and production features of the learning function. High efficiency gains tend to indicate a well-managed, highly engaged learning function.

Expenditure per Employee (Direct Formal)

A common and enduring benchmark, expenditure per employee ratios indicate the amount of learning resources allocated to each individual learner, and can fluctuate somewhat year to year depending on industry.

Expenditure per Employee (Total)

A common and enduring benchmark, expenditure per employee ratios indicate the amount of learning resources allocated to each individual learner, and can fluctuate somewhat year to year depending on industry.

Percentage of Expenditure on External Services

A common benchmark that denotes level of outsourcing, percentage of expenditure on external services can be disproportionately higher in smaller organizations, or in large organizations with heavy capital investments.

Percentage of Expenditure on Technology Infrastructure

A common benchmark that denotes level of investment in learning technology, percentage of expenditure on technology infrastructure indicates the learning function's contribution to the overall IT infrastructure, as well as the amount that the learning organization has been able to leverage technology efficiently in the past.

Percentage of Expenditure on Learning Staff

A common benchmark that denotes one of the largest expenditures managed by learning executives, percentage of expenditure on learning staff is sometimes used as a leading indicator of learning function costs, and consequently can illuminate future learning function costs, or changes in efficiency due to staff changes.

Cost per Formal Learning Hour Available/Provided

A fundamental indicator of efficiency, cost per formal learning hour available/provided represents the dollar cost of providing one hour of instruction regardless of the number of persons benefiting from the hour of learning content. Cost per formal learning hour available/provided is a common and enduring benchmark, and can reveal information about the future ability of an organization to deliver learning content efficiently given the current amount of resources allocated to it.

Cost per Formal Learning Hour Used

Another fundamental indicator of efficiency, cost per formal learning hour used represents the dollar cost of providing one hour of instruction to one person within the organization. Cost per formal learning hour used is also a common and enduring benchmark, and can reveal information about proximity to capacity of the learning function's operation, and the learning function's ability to scale.

Cost per Hour of Work-Based Learning Used

Akin to cost per *formal* learning hour used, cost per hour of work-based learning used represents the dollar cost of providing one hour of work-based learning content to one person in the organization. Cost per hour of work-based learning can be compared to the cost per formal learning hour used to determine whether learning resources are being deployed in a manner that maximizes use of time, whether certain methods of delivery are being used for maximal effect, and whether the learning function has achieved optimal balance of formal and work-based learning.

Ratio of Employees to Learning Staff

Similar in principle to ratios of formal content available per learning staff member, ratio of employees to learning staff differ in that they denote how much attention and resources can be devoted to organizational learning needs at a given time.

Centralization of Learning Staff

A highly centralized learning staff can create a more synergistic learning organization, better able to produce and deliver quality content given a constant amount of learning organization resources.

Centralization of Learning Budget

Centralized learning budgets reduce the need for excessive administrative resources or tracking effort. Centralized budgets reduce redundant or unstrategic learning activities, and permit allocation decisions to be made according to a single set of goals, and not potentially conflicting goals. Centralized budgets also increase the likelihood of the learning function being managed according to the culture of the wider organization, giving it greater visibility and modularity with the scheme of the entire organization's budgeting. A high degree of centralization increases the likelihood that all these benefits contribute to the effect of centralization of budget on efficiency.

Turnover of Learning Staff

The benefits of having a stable learning staff are numerous, and affect every aspect of the learning function. Low turnover better allows the learning function to standardize work processes, maintain high productivity, retain unique skills, and maintain consistent output. High turnover may create a ceiling level of efficiency for the learning function, owing to disproportionately high resources being directed towards onboarding new learning staff.

Tenure of Learning Staff

Similar to low turnover, greater tenure of learning staff allows the learning function to standardize work processes, maintain high productivity, retain unique skills, and maintain consistent output. High tenure is a key ingredient of optimal resource allocation among staff within a learning function. When tenure reaches a certain level, efficiency gains can be realized within a learning function.

Hours of Formal Content Available per Learning Staff Member

Hours of formal content available per learning staff member often indicates the durability and reusability of an organization's learning content. Yet hours of formal content available is useful as an indicator of efficiency, in so far as hours of formal content available per learning staff member illuminates the continuing amount of resources needed to create and manage formal learning content.

Hours of Formal Content Usage per Learning Staff Member

One of the benefits of formal content delivery is that it can reach many learners at once. High formal content usage per learning staff member indicates an ability to reach groups of learners with a given amount of resources, and combined with other metrics can indicate changes in fixed and variable costs, or marginal improvements in formal learning due to increases in learning function reach or scope.

Hours of Work-Based Learning Usage per Learning Staff Member

Hours of work-based learning usage per learning staff member refers to the level of success by which staff are able to introduce and manage work-based learning activities within the organization.

Knowledge Repository Usage per Learning Staff Member

Knowledge repository usage per learning staff member refers to the ability of the learning staff to capture expert knowledge in a usable format, and to render it usable to learners within the organization. In a word, it is the ability of the learning function to broker expert knowledge within the organization.

Hours of Knowledge Sharing Planned/Facilitated per Learning Staff Member

Frequently, facilitating effective knowledge sharing is a more difficult task than facilitating formal learning. Yet the positive effects of knowledge sharing activities include the ability to scale quickly throughout one or more workgroups, in some cases organically.

Formal Learning Content Reuse Ratio

Formal learning reuse ratio indicates the amount of formal learning content successfully applied in events over time, among separate groups of learners. A higher formal learning content reuse ratio indicates the ability of an organization's learning function to anticipate the need for future allocations of resources, produce durable learning content, and deploy learning programs throughout the organization continuously over long periods of time.

Knowledge Repository Reuse Ratio

Knowledge repositories reuse ratio indicates the amount of formal learning content successfully applied in events over time, among separate groups of learners. Knowledge repositories often contain vast stores of expert knowledge. Some of this expert knowledge applies beyond a single production or management technique, or a single organizational unit. Greater access of expert knowledge that can apply to many situations within a knowledge repository can reduce the need for mostly costly and time consuming programmed learning activities or larger scale formal learning programs, and increase time on task for especially complex work activities.

Standardization of Processes

Also referred to as templating, a high degree of standardization of processes allows for efficacious production techniques to be encoded in actual production processes, requiring minimal search effort by the learning staff. Greater standardization also reduces likelihood of producing defective or misaligned learning programs, and helps create a standard learning environment that reduces the cognitive load on learners.

Documentation of Processes

Thorough documentation of processes (both learning processes and business processes related to the learning function) reduces the need to "reinvent the wheel," allowing learning managers to assemble a collection of best practices, and evaluate records of past learning programs and their results for the purposes of continuously improving both the learning function, and business processes.

Automation of Processes

A fundamental aspect of efficiency, pervasive process automation facilitates precise management of resources and production, reduces variable costs, and potentially increases the reach of the learning function without increasing variable costs.

Responsiveness of the Learning Function

Highly nimble learning functions are better able to provide targeted learning and just-in-time solutions, using fewer resources to achieve desired results. In some cases a highly responsive learning function achieves efficiency benefits by providing more compact learning programs at an earlier phase in employee development, thereby obviating the need for larger, more costly programs at a later employee development phase.

Formal Hours Available/Provided Online

Formal hours available online have the advantage of being globally available within an organization, on-demand, and not confined to a specific location. More formal hours available online can reduce hours off task for learners. Online formal learning content also permits immediate evaluation and feedback, and can help detect additional learning needs much sooner than traditional classroom-based formal learning.

Formal Hours Used Online

Formal hours used online indicates the adequacy of the technological infrastructure delivery capacity, delivery efficiency, and substitutability of online formal learning content for traditional classroom-based learning content.

Management of External Providers

More and more organizations are finding management of external learning services providers to be as much of a challenge as managing the learning function activities that remain within the organization. However, since many outsourcing decisions are made with the aim of increasing learning function efficiency, adequate levels of external learning services partners are needed to realize the efficiency benefit of outsourcing elements of the learning function.

Alignment Score

Level of alignment of the learning function affects nearly every aspect of learning function effectiveness indirectly. High alignment is critical for any systematic learning initiative to be effective, though determination of the precise areas of the learning function affected can in some cases require a review of several periods of data.

Competence Gap

Competence gap refers to the discrepancy between existing skills inventories and skills inventories needed to meet organization objectives. A long-term result of an effective learning function is a small or gradually decreasing competence gap.

Human Capital Readiness

An important aspect of a truly strategic learning function is the ability to accumulate and deploy human capital to meet and anticipate future challenges. High human capital readiness is associated with an organization that can resist deleterious effects of industry shocks, meet a changing environment without depleting resources, and can influence their industry space to the point of exerting industry leadership. High human capital readiness therefore portrays adequate human capital accumulation, and an aptitude for future human capital deployment. High human capital readiness also indicates successful appropriation of individual knowledge capital to the organization.

Reduction in Time to Competence/Performance

One of the most powerful indicators of learning function effectiveness is the level to which it facilitates an organization creating economies of scale within its own production functions.

Individual Productivity Improvement

As it relates to individual productivity improvement, effective learning is rarely episodic, but rather systematic, targeting necessary aspects of a learner's development throughout a learner's tenure on a project or in a role. Although individual productivity often varies among employees after they have completed a learning program and returned to their jobs, an acceptable level of improved average individual productivity is necessary to drive improved business unit and organizational productivity. High levels of individual productivity improvement therefore indicate a likelihood of organizational productivity improvement, in particular, productivity improvement that can be readily measured and whose effect can be traced back to the effective learning.

Business Unit Productivity Improvement

A learning function that is well-distributed throughout business units, and capable of accommodating diverse learning plans between and within individual business units is better able to bring a group of employees to increasing levels of productivity, and is one of the hallmarks of the learning function's effectiveness.

C-Level Satisfaction

In nearly every organization that has a demonstrably effective learning function, the support of senior management is a critical component. Satisfaction among C-level management can indicate the learning function's effectiveness; high satisfaction predicts a propensity to commit substantial amounts of attention and resources to the learning function, which creates an environment capable of driving learning function effectiveness.

Business Unit Leader Satisfaction

Business unit leaders nearly always have first-hand knowledge of whether a learning program is achieving desired results, and frequently play a key role in whether a learning program is ultimately effective. By virtue of their influence with senior management, business unit leader feedback about learning function results often carry great weight, and will likely have substantial influence on senior managers' perceptions and future learning investment decisions. With regard to their effect on subordinates, business unit leader approval or level of enthusiasm toward a learning program can determine a learning program's effectiveness. It is rare that a learning program can expect long-term success without high levels of business unit leader satisfaction.

Learner Satisfaction (Formal)

Learner satisfaction with formal learning opportunities is a fundamental part of the general perception of learning opportunities within an organization. High satisfaction indicates ongoing susceptibility to the positive effects of formal learning, and an ongoing willingness to exchange valuable time on task with time spent away from the task, in a formal learning program.

Learner Satisfaction (Work-Based)

Learner satisfaction with work-based learning opportunities is also a fundamental part of the general perception of learning opportunities within an organization. High satisfaction indicates a propensity to participate fully in future learning programs, and to accept environmental or technological enhancements to their work functions.

Turnover

Though not strictly a part of the learning function, organizational turnover has a strong bearing on the effectiveness of the learning function. Low turnover creates stability, and obviates needs for repeating learning activities. Groups with low turnover assimilate new knowledge quickly, and create a more nimble, highly responsive learning function.

Promotions

In an increasing number of organizations, the learning function is being relied upon to prepare selected staff for promotions. In such organizations, a high number of promotions can indicate learning function's mid and long-term effectiveness in shaping promotable personnel, and preparing them for assumption of high levels of responsibility within the organization.

Employee Alignment with Culture/Values

Successful organizations often have a unique, vibrant culture which impacts organization performance incalculably. An effective learning function actively engages employees in the organization culture and values, at all phases of an employee's growth. High employee alignment with culture/values is therefore both an input and an output of effective learning.

Employee Satisfaction

Employee satisfaction represents a broad response to past formal and work-based learning opportunities, and indicates whether future responses to formal and work-based learning opportunities are likely to be successful. High employee satisfaction relates to employees valuing learning programs, and taking an active role in improving those aspects of their work experience that constitute much of their satisfaction.

Absenteeism per Employee

Though having multiple causes, low absenteeism per employee is nevertheless associated with an effective learning function. Low absenteeism per employee indicates a higher likelihood of employee engagement, an implicit objective and a desired result of effective learning programs. High absenteeism per employee can indicate other deficits in learning function effectiveness, particularly when considered with other measures of employee engagement.

New Products and Services

Few organizations are exempt from the pressures to innovate, adapt, and grow. Being able to offer new products and services is fundamental for an organization to remain competitive. An effective learning function supports nearly every aspect of new product and service development and deployment -- from the learning of new production skills, to readying a sales force, to customer education. A higher number of new products and services, when considered with other figures, can determine the effectiveness of the learning function in transforming innovation into valuable products and services.

SUSTAINABILITY INDEX INDICATORS

Customer Satisfaction

Customer satisfaction affects most organizations' bottom line, directly and indirectly. High customer satisfaction is the result of numerous processes which contribute to the value of that product or service, and will drive customers to prefer that brand. Customer satisfaction therefore indicates the extent to which systematic learning programs have resulted in product or service differentiation.

Percentage of Revenue from New Products and Services

Innovative products and services owe part of their innovativeness to contributions from effective learning functions, which support the establishment of various revenue streams related to new products and services. A high percentage of revenue from new products and services is a more direct indicator of the effectiveness of investments in systemic learning programs in extracting rents due to timely market entry, market positioning, product or service differentiation, or other ability to command a price premium

Organizational Readiness

Organizational readiness represents potential adaptability to environmental shocks, market and regulatory environment changes, attacks from competitors, and to the evolution of the industry space in which an organization exists. Organizations capable of adapting require a learning function that itself is optimally ready to adapt and respond to strategic and tactical needs brought about by changes that the organization experiences.

Revenue per Employee

A fundamental effectiveness measure, revenue per employee indicates the level at which an organization is able to drive productivity through its employees, and its capacity for extracting revenue returns from its investments in learning.

Alignment Score

Level of alignment of the learning function is an important yet intangible aspect of sustainability. In the context of sustainability, alignment score relates to the degree to which the learning function is integrated into the larger organization, and is given responsibility for critical organizational goals. A high level of alignment indicates a strong connection to critical and fundamental organizational processes, and the likelihood of the learning function to achieve and maintain "top-of-mind" status among business leaders.

Integration with Business Planning

Any business function or process that is not tied to fundamental business planning has a low chance of enduring more than one business cycle, and the learning function is no exception. The learning function that maintains close ties with business planning is less vulnerable to resource reallocations, or catastrophic budget reductions. A high degree of integration with business planning indicates a learning function that is less likely to be deployed in reactionary ways, and more likely to become an ongoing partner in the formulation and execution of organizational strategy.

Job Competency Documentation

A high amount of job competency documentation facilitates accumulation of a skills inventory, which affords more precise skills gap analysis, and allows the learning function to better plan learning programs. An ability to exploit these benefits increases the potential of rendering the learning function into a producer and manager of valuable organizational assets.

Individual Competency Profiles

A high amount of individual competency profiles are an important part of developing a skills inventory, as well as talent management programs. High amounts of individual competency profiles also promote better job matching, and team or group assignment, and identification of high-potential employees. When combined with adequate job competency documentation, individual competency profiles complements standard HRD functions, better facilitating integrated employee development over a longer duration of an employee's tenure in the organization.

Centralization of Learning Staff

A highly centralized learning staff is more likely to cohere as a group and perform synergistically. A centralized learning staff is less likely to invest in redundant learning programs, and is better able to communicate and cooperate with business lines and senior management.

Centralization of Learning Budget

A centralized learning budget has the advantage of transparency among business line owners, senior management, and learning executives, which allows learning resources to be treated rigorously, and in accordance with the organization's strategic objectives. For these reasons, a highly centralized budget may create a propensity for senior management to approve larger, less restricted, or wider-scoped budgets. Centralized budgets can be evaluated with demanding excessive management attention.

Highly centralized budgets can be tied more readily to other organizational performance measures, and increase the likelihood of the learning function being institutionalized, and becoming a fundamental part of the organizations structure and functioning.

Learning Staff Turnover

Experienced learning staff members come to possess extraordinary amounts of knowledge both about the organization's learning function, and about the critical success factors of their organization. Retaining learning staff over several business cycles retains expert knowledge, creates stability within a learning function, and solidifies the learning organization's strategic role within the larger organization.

Standardization of Processes

Standardization of learning processes is a fundamental aspect of reusability, which allows learning resources to be applied without using excessive learning function resources, and permits recurring activities and operations to be managed by exception.

Documentation of Processes

Documentation of processes creates a record of learning activities, which can be evaluated and improved upon, and referred to when constructing future learning programs. High levels of process documentation render the learning function more accessible for all learning function consumers with the organization. High levels of documentation also increase the likelihood of effective learning processes achieving permanency with the organization.

Automation of Processes

Automation of learning processes frees up learning function resources, permitting recurring activities and operations to be managed by exception. A high degree of automation encodes organizational best practices into regular workflow, retains accumulated knowledge, and indicates that critical aspects of the learning function are performing optimally while not consuming excessive organizational resources.

Maturity of Management of Formal Learning

Maturity of formal learning management is associated with a durable and adaptable learning function, one that has created and managed several formal learning programs. A high level of measurement maturity indicates confidence in future formal learning programs, and the expectation that future formal learning programs will create results that can be managed by business leaders to achieve their own business unit objectives.

Work-based Learning Infrastructure

Work-based learning will have limited impact if unable to scale due to inadequate infrastructure. Similarly, if work-based learning lacks infrastructure, learning programs are likely to become "one-shot training programs," whose impact will likely last only in the very short term. A high degree of infrastructure indicates a stable commitment of resources throughout the organization to enhance the workplace, and a commitment to provide multiple, mutually supportive learning events.

Infrastructure Standardization

A high amount of infrastructure standardization promotes greater reuse and modularity, allowing for adequate planning and delivery of work-based learning programs over multiple occasions.

Measurement Maturity

Measurement maturity reflects a high perceived value of learning, and a commitment among learning executives to make learning relevant to all organization stakeholders. A high degree of measurement maturity reflects successful efforts to capture the effect of learning in organizational objectives, and indicates the likelihood for the learning function and learning products to obtain adequate ongoing attention, and for the learning function to create manageable learning products.

Mapping Of Formal Learning to Job Competencies

The results of a successful formal learning program often include additions to an organization's skills inventory. Learning functions that make the effort to increase important organizational assets, and can demonstrate success in doing so, are more likely to garner adequate resources and be consulted for future organizational initiatives.

Mapping Of Work-Based Learning to Job Competencies

The results of a successful work-based learning program often include additions to an organization's skills inventory, and encourages senior management to consult the learning function when attempting to improve some aspect of the workplace. Learning functions that make the effort to make important contributions to the workplace environment, and can demonstrate success in doing so, will often be allocated adequate resources and support to continue their efforts.

Mapping Of Formal Learning to Employee Learning Plans

The evaluation stages of successful formal learning programs often reveal information about individual learner characteristics, and how those characteristics could be developed to the maximal

benefit of the organization. Learning functions that make the effort to feed such knowledge back into individual learning plans will frequently be regarded as a strategic partner in major personnel and HR initiatives, thereby gaining a scope outside the strict bounds of the learning function.

Mapping Of Work-Based Learning to Employee Learning Plans

As with formal learning programs, the evaluation stages of successful work-based learning programs often reveal information about individual learner characteristics, and how those characteristics could be developed to the maximal benefit of the organization. Learning functions that make the effort to feed such knowledge back into individual learning plans will often be regarded as a strategic partner in major personnel and HR initiatives.

C-Level Satisfaction

Senior management in nearly all cases determines a substantial portion of the learning function's budget, and therefore must be satisfied that their allocations and investment of resources achieve adequate results. A high level of satisfaction among senior managers denotes confidence in the learning function, and in learning executives' ability to achieve favorable strategic and tactical results. High C-level satisfaction indicates a lower likelihood of decreased learning budgets, or mandates reductions in scope and activity.

Business Unit Leader Satisfaction

Business unit leaders assume high accountability for their decisions to invest in learning for their lines of business, and usually have first-hand knowledge of whether a learning program achieves its desired results. Business unit leaders in essence are the customers of the learning function, and their level of satisfaction frequently determines whether learning investments will continue, whether the learning function will be consulted as a strategic partner in fulfilling the objectives of the business, and whether learning programs are likely to exert desired effect on their businesses in the long-term.

Learner Satisfaction (Formal)

Learner satisfaction is not a perfect measure of the success of a learning program. However, a pattern or sustained trend of learner dissatisfaction will likely impact the desired results of a learning program adversely, and may create resistance or complacency about future learning programs. Conversely, high satisfaction increases the goodwill of the learning function, and may help offset short-term opportunity costs associated with participation in a formal learning program.



Learner Satisfaction (Work-Based)

Learner satisfaction is not a perfect measure of the success of a learning program. However, a pattern or sustained trend of learner dissatisfaction will likely impact the desired results of a learning program adversely, and may create resistance or complacency about future learning programs. Conversely, high satisfaction, particularly with work-based learning, enhances the workplace experience, and creates greater goodwill toward the learning function.

WLP Scorecard

General Definitions

Direct Learning Costs

An expenditure or resource allocation that is immediately tied to learning function activities. Direct costs include learning and performance staff salaries and wages, travel costs for learning and performance staff, administrative costs, non-salary development costs, non-salary delivery costs, outsourced activities, and tuition reimbursements.

FTE

See ***Full-Time Equivalent***

Formal Learning

Structured learning activities that are done separate from work. Formal learning most frequently takes the form of an online lesson, a classroom event, or a coaching event done separately from work.

Full-Time Equivalent

A unit of personnel employment equal to one staff person working a full-time work schedule for one year.

Indirect Learning Cost

An expenditure or resource allocation consequently, but not immediately tied to learning function activities. Direct costs typically do not include learners' travel expenses, costs of participants' conference attendance, fees, and travel, opportunity cost of lost work time while engaged in learning formal activities, and costs of internal subject matter experts' time for content analysis, coaching, and knowledge sharing.

Informal Learning

See ***Work-Based Learning***.

Knowledge Repository

A structure for collecting, storing, arranging, maintaining, and disseminating written, audio, and visual documentation of processes, procedures, techniques, and intelligence capable of being transferred to other individuals for the purpose of supporting workplace learning and performance.

Learning

A transformational agent that enables the performance of individuals, groups, and organizations, through development of knowledge, expertise, and human capital in individuals and collectively in the organization.

Learning Function/Learning Organization

The set of mechanisms and resources that deploy, monitor, and reports on all of the processes, resources, systems, conditions, and opportunities that promote and support learning and its conversion to performance in the enterprise.

Non-Learning Solutions

Activities or programs that support formal and work-based learning, but are not in themselves learning activities. Non-learning solutions typically refer to performance improvement activities, including such organizational development, process analysis, talent management, performance management, knowledge management, motivational activities, and job-specific tools and supports.

Performance

The measurable individual, group, and organizational activities, accomplishments, and outcomes.

Work-Based Learning

Learning activities embedded in, or coincident to an employee's normal work activity, including use of knowledge repositories, job aids, knowledge sharing, and coaching while doing work tasks.

Workplace

The internal organizational environment in which learning and performance occur. Workplace elements can act as inhibitors or enablers of learning and performance.