

# Strategic Blueprint

A Guide for Shaping Your Learning & Development Initiatives



# The Learning & Development Strategic Blueprint

The *Learning and Development Strategic Blueprint™* is a template and guide for any Learning and Development (L&D) team who wants to discover new ways to add value and be a source of strategic advantage for the business they serve.

This template is built from a number of resources, tools, and principles that CMOE frequently utilizes in designing and facilitating strategy retreats specifically for L&D and Senior Leadership teams. For those who are new to the work of charting a strategy and course of action, this blueprint will also provide insight into the strategy-formulation process and some of the methodology used during a strategy retreat.

This resource was developed with the following goals in mind:

- Create a long-term direction and a plan of action to navigate the future.
- Link and align the L&D team with the overarching business strategy and its stakeholders.
- Drive better, long-term business results.
- Create value for the broader organization.
- Build a culture of learning, execution, and accountability.
- Help inform your team so its members can make good decisions and focus time and energy on resources and the things that matter most.

As you develop your *Strategic Blueprint™*, be patient and work through it incrementally. Involve other members of the L&D team or other key stakeholders as you begin to build a draft of this blueprint.

Don't worry about trying to create a perfect strategy using this guide. Instead, work to create a draft that will initiate a strategic conversation with your team and help you finalize a strategy proposal and plan of action. If you need assistance or would like to consider organizing a facilitated strategic retreat with your team, please contact CMOE at +1 801 569 3444 or [info@cmoe.com](mailto:info@cmoe.com). One of our strategy coaches will be ready to support you and answer any questions you may have about the process and tools.

The Future is What *You* Make It.

# 1

## Company Vision & Mission

Describe the current vision, mission, or purpose of your organization in the space below.

1. Why does the business exist and what does it do?


2. How does your company define “winning” or “success”?


3. What is the strategic playing field for your company? Describe the products/services, geographies, core customers, or production stage that your company is focused on.


*“Strategy is a pattern in a stream of decisions.”*

*—Henry Mintzberg*

4. What are the core capabilities and relevant strengths your company is trying to leverage, as well as the weaknesses and vulnerabilities it is trying to improve?

Strengths	Vulnerabilities

5. What are the key priorities, initiatives, and actions that your company is pursuing to execute its strategy, create value, and grow and sustain its competitive advantage?


## 2 L&D Strategy

Describe the current vision, mission, or purpose of your Learning & Development function in the space below.

1. Describe what “success” and “winning” means for the L & D function. What are the overarching outcomes and long-term results you seek?


2. As best you can, outline the purpose and mission of the L & D function and team. Why does it exist?


3. What does your strategic playing field entail? Describe the L&D products/services/areas, geographies, and key customers your team is focused on.


4. Describe the value proposition your function offers the organization. What benefits are you committed to delivering that create value for the business?


5. Who are your primary L&D customers/users?


6. What critical jobs do your customers/users need you to perform (key pain points, problems, and requirements)?

Now	Future

7. What are the differentiating activities and capabilities you are uniquely qualified to perform (things that separate you from other potential service providers)?

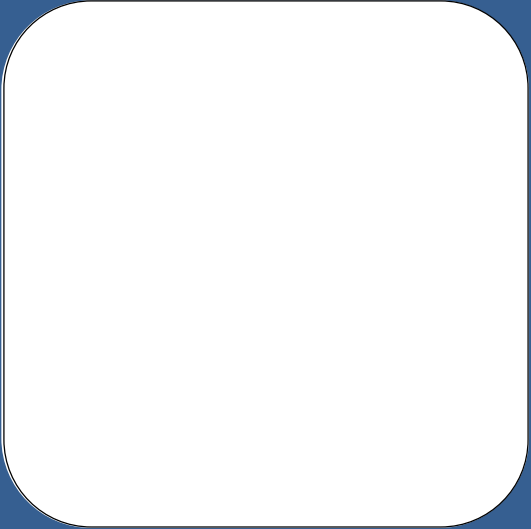
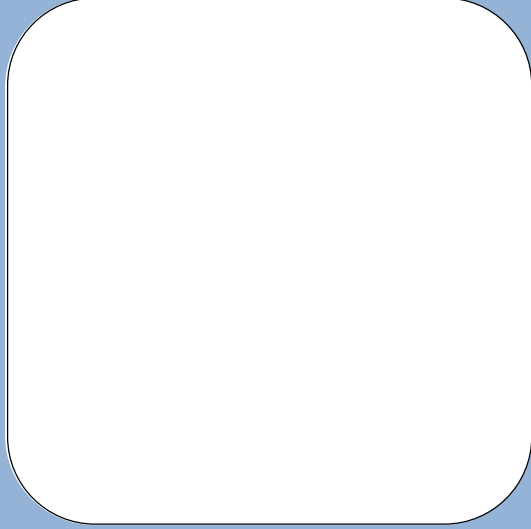
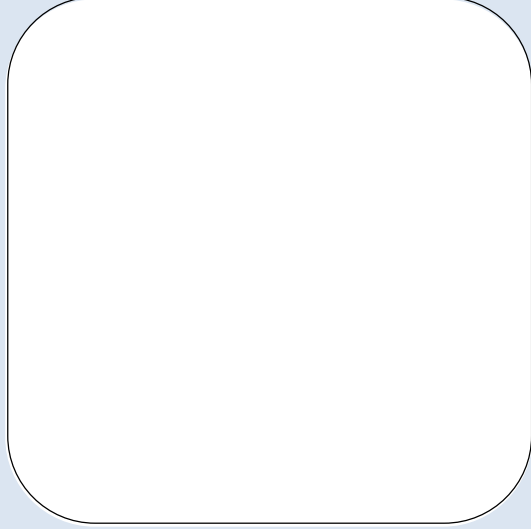

Unique, differentiating activities	Core capabilities that drive your success

8. What are the barriers and roadblocks that stand in the way of your aspirations to win and future success (risks, threats, and challenges)?


9. What are the key, new, future-focused objectives and goals your team needs to focus on to contribute value and deliver benefits to the organization well into the future (3-5 years)?


*“Success always comes when preparation meets opportunity.”*  
*—Henry Hartman*

10. What are the specific initiatives and priorities you need to consider to ensure your team remains relevant and that will help deliver on your value propositions and meet the emerging needs of your customers/users? Think of your activities, capabilities, products, and other the things you need to change using the framework below.

<p><b>Create &amp; Innovate</b></p> 	<p><b>Modify &amp; Improve</b></p> 
<p><b>Completely Eliminate</b></p> 	<p><b>Reduce or Streamline</b></p> 



# 3 Action Plan

Outline the major tasks that need to be accomplished to move you closer to the target.

If you have decided to move forward and implement a strategy, work through Step I and Step II of the Action Plan. These steps will help you see the big picture. Later on, complete Part III to define the smaller details and ensure that you have a well-thought-out plan to execute on.

## Step I: "Purpose & Need"

Lay the groundwork for your course of action and assure the success of your strategy.

1. What are the benefits of embarking on this strategy? How does it link and align with the organization's mission, vision, and strategy, or are there standalone, innovative benefits for you or your team?


2. What are the likely side effects, unintended consequences, risks, or implications of moving forward (for you, for others, for the organization)?


3. How do you plan to leverage and exploit the advantages and "tailwinds" that are supporting your strategic journey (strengths and favorable conditions)?


4. What do you plan to do to contain or curtail major threats and “headwinds” (weaknesses and vulnerabilities)?


5. Who needs to be involved to support the strategy and what level of involvement do you need (information, consultation, active participation, resources, etc.)?


6. What resources and assets, within your immediate control, can you apply to this course of action?


7. When do you want to complete this initiative?

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# About CMOE

The Center for Management and Organization Effectiveness (CMOE) was founded in 1978 with the vision and mission to help organizations improve their leadership and team member skills through training, consulting, and research services. Over the years, CMOE has developed highly effective, skill-based training programs, workshops, materials, and high-impact experiences that address the specific learning and development needs of individuals and organizations. Our content is designed around timely, applicable research that has practical, easily transferable relevance in the workplace. CMOE also continues to develop customized courses for our clients that make an impact on the leaders and team members of today and tomorrow. In addition, CMOE has certified facilitators located in all regions of the world, making us one of the most flexible service providers in our industry.

## Sample Workshops

Applied Strategic Thinking™	Virtual Leadership
Strategic Leadership	Mini-MBA
Coaching Skills	Facilitation Skills
Coaching TIPS <sup>2</sup> ™	Transition into Leadership
Qualities of Leadership	Advanced Management and Leadership
Exploring Teamwork	Custom Workshops and Curriculum

*For a complete list of topics, for both standalone and customized workshops, visit [www.cmoe.com](http://www.cmoe.com)*

## Delivery Methods

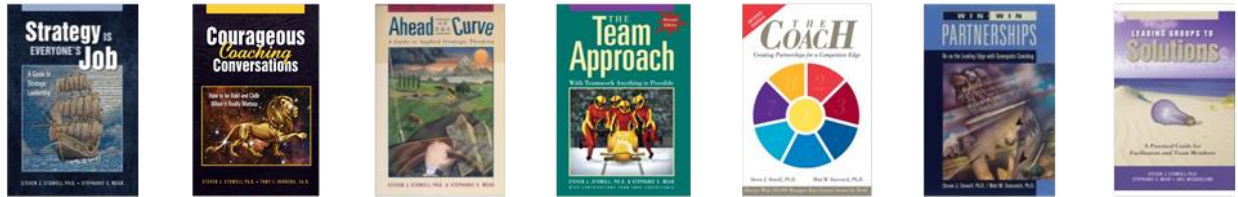
- Classroom workshops
- Blended learning
- Individual coaching and mentoring
- Sustainability services
- Train-the-Trainer services
- Webinars (Live or on-demand )
- Webcasts (Live or on-demand)
- Offsite Retreats

## Learning Methods

Our suite of learning products is offered in the form of live classroom, virtual classroom, or web-based programs. The length of the course is flexible and depends largely on the delivery method chosen.

CMOE offers Train-the-Trainer service in which we provide the skills and knowledge necessary to deliver learning experiences at any time. Clients who choose this option simply purchase the participant materials or tools from CMOE on an as-needed basis once they are certified to deliver the learning program.

## Publications



*These titles may be purchased through CMOE at [www.cmoe.com](http://www.cmoe.com) or Amazon.com*

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## Contact



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