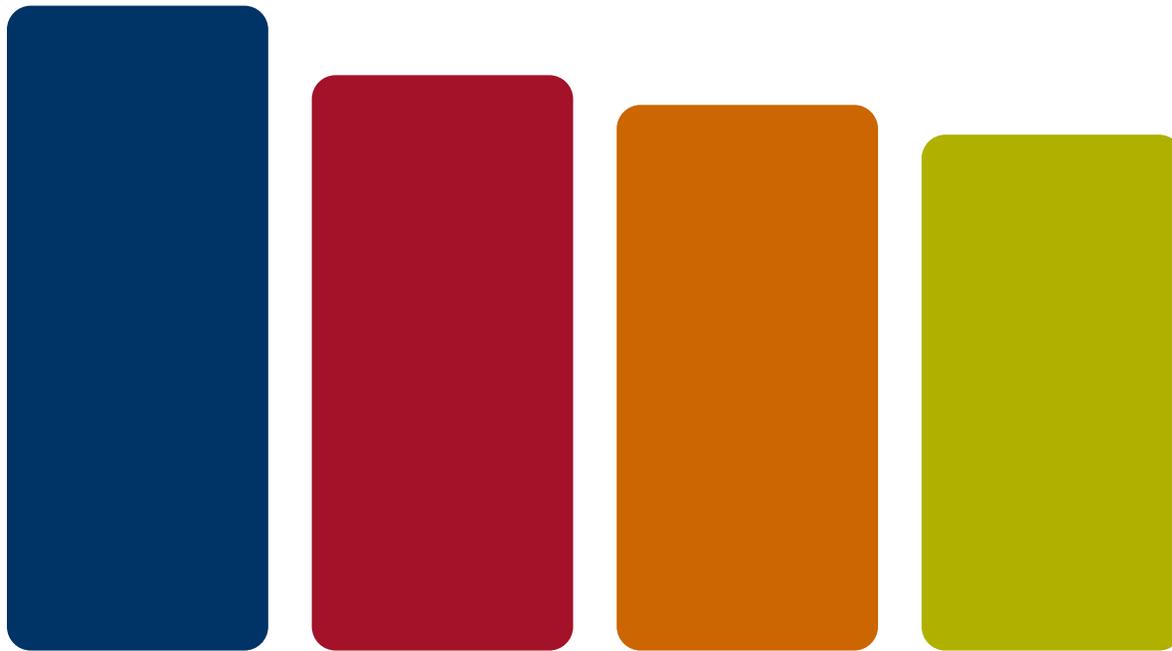


The Learning Business Maturity Assessment



*developed by Jeff Cobb
and Celisa Steele*

THE LEARNING BUSINESS MATURITY ASSESSMENT

The Learning Business Maturity Model™ articulates the characteristics and practices of a mature learning business and the stages that typically precede full maturity. The Learning Business Maturity Assessment™ can be used by learning businesses to gauge their performance in the five domains we have identified as key to overall performance and success.

The model and the assessment are intended specifically for market-facing learning businesses that focus on lifelong learning, continuing education, and professional development. They are not intended for corporate training departments or degree-granting programs. (Visit www.tagoras.com/maturity for access to the Learning Business Maturity Model.)

The assessment will yield a score for each of the five domains and an overall score. The overall score will help learning businesses determine their maturity stage. The scores for each of the domains will help businesses identify their strengths and the areas that need the most attention to move to the next stage of maturity.

Best Practices for Using the Assessment

Enlist a diverse range of stakeholders to take the assessment. The stakeholders should be limited to those able to respond to most of the questions—so this will not include learners or customers and will include only a subset of staff, contractors, and volunteers (such as subject matter experts). If your learning business is part of a larger organization (as is often the case with trade and professional associations), you should include stakeholders from the larger organization who are not directly part of the learning business. A low number of potential assessment-takers may suggest that you need to spend time educating staff and others to grow the pool of people familiar with the learning business.

Identified stakeholders should take the assessment independently to avoid influencing one another's answers. Then the individual results should be averaged to determine a learning business's maturity stage. We recommend a minimum of three people. We suggest no maximum—the more stakeholders you can engage in the process, the more confident you can feel that the results accurately reflect your learning business's maturity.

After the individual assessments have been completed and averaged, convene the stakeholders to discuss. In situations where the outcome is particularly contentious, you may want to ask stakeholders to re-take the assessment after the group discussion to get a new aggregate score.

Instructions and Determining Assessment Scores

The assessment begins with two demographic questions to identify whether the respondent works primarily in the learning business and whether the respondent serves in a leadership or management role or works as an individual contributor.

The bulk of the assessment follows the demographic questions and consists of 40 statements: 8 for each of the 5 domains that we have found to be critical to the success of the learning and education businesses (Leadership, Strategy, Capacity, Portfolio, and Marketing). For each statement, assessment-takers indicate whether they agree or disagree that it describes their learning business *as it currently exists* (not as they wish it were). They should choose Strongly disagree, Disagree, Neutral, Agree, Strongly agree, or No information for each statement.

Assessment-takers should be urged to use the No information option sparingly and only in cases where they truly do not have any information on which to assess the statement and so cannot give another, more meaningful answer.

In the far right column for each domain, indicate the value of the response: Strongly disagree = 0, Disagree = 1, Neutral = 2, Agree = 3, Strongly agree = 4, and No information = NI. Tally the numbers to identify a score for that domain. After responding to all 40 statements, add the totals from the domains to identify an overall score for the learning business.

The Assessment

DEMOGRAPHICS

1. Do you spend the majority of your time working in our learning business?

Yes No

2. Which best describes your role?

Leader Manager Individual contributor

LEADERSHIP

Add the numeric values for your responses to the eight statements to identify your score for this domain. Record the score below.

1. A clear vision has been articulated for our learning business.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
2. The vision for our learning business has been communicated, understood, and embraced throughout our organization.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
3. One or more individuals are clearly responsible for the operations and success of the learning business.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
4. Those responsible for the operations and success of the learning business are held accountable.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
5. We have a culture in which people are willing to take risks, fail, improve, and grow rapidly.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
6. A succession plan is in place for key roles in managing and leading our learning business.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
7. We consistently strive for diversity and inclusion—e.g., in our staff, our contract relationships, and the input we receive from our audience—in pursuing the vision for our learning business.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
8. Our leaders have strong peer relationships with leaders at other organizations.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |

STRATEGY

Add the numeric values for your responses to the eight statements to identify your score for this domain. Record the score below.

1. There is a clearly articulated and documented strategy for our learning business.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
2. The strategy clearly aligns with and supports our vision for learning and education.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
3. The strategy provides distinctive, differentiated positioning for our learning business and its offerings.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
4. The strategy has been communicated, understood, and embraced throughout our organization.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
5. A clear plan for executing the strategy has been established, and relevant roles and responsibilities have been clearly assigned.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
6. Clear metrics to gauge the success of the strategy have been articulated and are tracked consistently.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
7. Results from tracking metrics are shared with relevant stakeholders and responded to on a consistent, ongoing basis.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
8. The strategy is revisited and adjusted on a regular basis.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |

CAPACITY

Add the numeric values for your responses to the eight statements to identify your score for this domain. Record the score below.

1. Our learning business has access to all necessary human resources (staff or contract) to address current needs.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

2. Our learning business has ample resources to support innovation and growth.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

3. Staff members have a strong, baseline knowledge of evidence-based adult learning principles and methodologies.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

4. All key business processes are well defined and continuously evaluated and improved.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

5. Our learning business consistently invests in professional development opportunities for staff.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

6. Staff members have a working level of domain expertise for key topics and issues in the field or industry our learning business serves.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

7. Our learning business provides a well-defined and documented approach to helping subject matter experts deliver high-quality educational experiences.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

8. Our learning business makes strategic use of technology to support the development, delivery, and tracking of its offerings.

Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
 0 1 2 3 4 NI

PORTFOLIO

Add the numeric values for your responses to the eight statements to identify your score for this domain. Record the score below.

1. Our products and services clearly align with the vision and strategy articulated for our learning business.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
2. Our products and services are based on a validated understanding of learner needs and wants.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
3. Our products and services employ modes and methods that clearly align with learner needs and wants.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
4. Our learning business tracks and assesses the impact of key products and services on learners over the longer term.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
5. Our learning business tracks and assesses the impact of key products and services on its target field or industry over the longer term.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
6. Our products and services offer clear ways for learners to assess their own learning achievement.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
7. Our learning business regularly experiments with new media and technologies for delivering and facilitating learning experiences.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI
8. Our learning business regularly experiments with new models and formats for delivering and facilitating learning experiences.
Strongly disagree *Disagree* *Neutral* *Agree* *Strongly agree* *No information*
0 1 2 3 4 NI

MARKETING

Add the numeric values for your responses to the eight statements to identify your score for this domain. Record the score below.

1. Staff members have a solid working knowledge of fundamental marketing principles and practices.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
2. Our learning business has identified and regularly tracks key sources of information about customer behavior and needs.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
3. Our learning business has a validated understanding of the overall market and competitive environment.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
4. Appropriate, up-to-date marketing methodologies are used consistently to attract customers to our learning business's offerings.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
5. The marketing methodologies used are consistently tracked for effectiveness.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
6. Our learning business has a clearly articulated and understood process for pricing its offerings.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
7. We have a clearly articulated and understood branding strategy for the learning business overall and for key offerings.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |
8. The target audience perceives our learning business as a leader of learning and education in its field or industry.

| | | | | | |
|--------------------------|-----------------|----------------|--------------|-----------------------|-----------------------|
| <i>Strongly disagree</i> | <i>Disagree</i> | <i>Neutral</i> | <i>Agree</i> | <i>Strongly agree</i> | <i>No information</i> |
| 0 | 1 | 2 | 3 | 4 | NI |

OVERALL SCORE

Add the scores for each domain to identify your overall score.



Interpreting the Assessment Scores

Both the domain-level score and the overall score can help you understand how your learning business currently performs and where you might need to focus to move to a more mature stage. But we encourage you to not blindly accept the scores. Review the descriptions. Are they accurate for your organization? Where do you disagree? Where is there a variance in stakeholders' responses? Are there domains or specific statements where assessment-takers frequently used the No information option? Answering these questions can provide added insight into where you should focus efforts.

OVERALL SCORE

Your overall score suggests the overall maturity of your learning business.

- 0 to 40 = Stage 1: Static
- 41 to 80 = Stage 2: Reactive
- 81 to 120 = Stage 3: Proactive
- 121 to 160 = Stage 4: Innovative

DOMAIN-LEVEL SCORES

Your domain-level score suggests the maturity of your learning business in that particular domain.

- 0 to 8 = Stage 1: Static
- 9 to 16 = Stage 2: Reactive
- 17 to 24 = Stage 3: Proactive
- 25 to 32 = Stage 4: Innovative

Because the overall score is a roll-up of domain-level scores, it is instructive to see how your stage assignment for the domains compares to your overall stage. Focusing on improving in lower-scoring domains should help you align your learning business and enable you to move on to higher levels of maturity.

While we have not weighted the domains in the overall score, Leadership and Strategy are foundational—it will be difficult for a learning business to progress to a high level of maturity if it is weak in those two domains.

HOW TO HANDLE NO INFORMATION RESPONSES

Pay close attention to No information responses. *If any statement in any domain has no substantive responses for one of the eight statements, the domain-level score and overall score do not apply.*

An individual may use the No information response without nullifying the scores, but if *all* respondents choose No information, you cannot get an accurate view of your performance in that domain or overall. Statements for which only No information responses are given indicate areas where you need to do work before you can get valid assessment results.

When you average stakeholders' responses, the No information responses may or may not be an issue of concern. We suggest you scrutinize statements where you have more respondents selecting No information than you have respondents providing substantive replies (the Strongly disagree, Disagree, Neutral, Agree, and Strongly agree options). These may reveal areas where you need to raise awareness and/or, depending on the ratio of No information responses to substantive responses, areas where you should not trust the resulting average.

In cases where you have a significant ratio of No information responses, look at the particular statement to see if it makes sense that some stakeholders might not be knowledgeable about that item. There may be situations where that is acceptable. Or you may realize that you should be wary of the average score associated with that statement.

CONSOLIDATING RESULTS

To help you consolidate the assessment responses from your stakeholders, we offer the Tagoras Learning Business Maturity Model Assessment Scoring Sheet (a link to download the scoring sheet was included in the same e-mail that included the link to this assessment). Once you enter your stakeholders' responses in this Excel workbook, formulas tabulate your domain-level and overall score and flag statements where you have a questionable ratio of substantive responses to No information answers.

A vintage, sepia-toned map of the world, likely from the 17th or 18th century, featuring a grid of latitude and longitude lines. A brass compass rose is positioned in the upper right quadrant, with its needle pointing towards the top of the frame. The map shows various continents and oceans, with some text in Latin, such as 'ORBIS TERRARUM' and 'AMERICA'.

Looking to travel your path to maturity faster?

Tagoras can help. Our Maturity Accelerator Program™ (MAP) is a multi-week program designed to help organizations leverage the Learning Business Maturity Model™ effectively and efficiently.

We work with you and your team, aligning the model to your specific situation and needs and helping you move along the path to full maturity with greater speed and confidence.

Learn more about MAP at www.tagoras.com/maturity-accelerator-program.

ABOUT US

At Tagoras (pronounced tah-GOR-us), we serve the global market for adult lifelong learning, continuing education, and professional development.



Founded in 2007 by veteran edupreneurs Jeff Cobb and Celisa Steele, Tagoras uses its expertise to help clients better understand their markets, connect with new customers, make the right investment decisions, and grow their learning businesses. We achieve these goals through expert market assessment, strategy formulation, and platform selection services. We also create and publish a variety of resources designed to support learning businesses.

Learn more about Tagoras, who we serve, and how we help clients maximize their reach, revenue, and impact at www.tagoras.com.

