

The Learning Business Maturity Model

developed by Jeff Cobb and Celisa Steele

INTRODUCING THE MODEL

The Learning Business Maturity Model™ articulates the characteristics and practices of a mature learning business and the stages that typically precede full maturity. The model is intended specifically for market-facing learning businesses that focus on lifelong learning, continuing education, and professional development. It is not intended for corporate training departments or degree-granting programs.

We envision maturity progressing through four stages: Static, Reactive, Proactive, and Innovative. In each stage, we gauge maturity according to characteristics and performance in five domains that we have found to be critical to the success of the learning businesses we have been involved with over our years of experience. Where the learning business is part of a larger organization—as it is in many trade associations and professional societies—the model deals with these domains *in the context of the learning line of business*, not the entire organization.

- Leadership
How clear is the vision for the learning business? How is accountability for achieving the vision shared and sustained over time? Is there a culture of learning throughout the organization and its audience?
- Strategy
How clearly articulated is the strategy? Has it been communicated and embraced broadly? Are clear metrics established and tracked, and is the strategy adjusted based on the data captured?
- Capacity
Does the learning business have sufficient capacity, in terms of human resources and technology, to pursue the vision and strategy effectively?
- Portfolio
Are the content, methodologies, and modalities aligned with well-researched, thoroughly understood learner needs? Is the impact of learning assessed over time?
- Marketing
Is there a validated understanding of the overall market and the competitive environment? Are appropriate marketing methodologies used consistently and tracked for effectiveness?

Profiles of the Four Stages of Maturity

The four profiles that follow offer generic snapshots of learning businesses at each stage of maturity and assume similar performance across all five domains. In reality, most learning businesses perform better in some of the domains and worse in others.

We have developed an assessment that learning businesses can use to gauge their performance in each of the five domains. (See www.tagoras.com/maturity for access to the Learning Business Maturity Assessment™.)

Based on the total score from the assessment, businesses can determine their overall maturity stage. Based on scores for each of the domains, businesses will be able to identify their strengths and areas that need the most attention to move to the next stage.

For example, a learning business may perform at a Stage 3 level for Capacity and Portfolio but at lower levels for Leadership, Strategy, and Marketing. As a result, the business overall may best be described as being at Stage 2, and it would be clear that the business should focus on improving in the domains of Leadership, Strategy, and Marketing to progress to Stage 3 maturity.

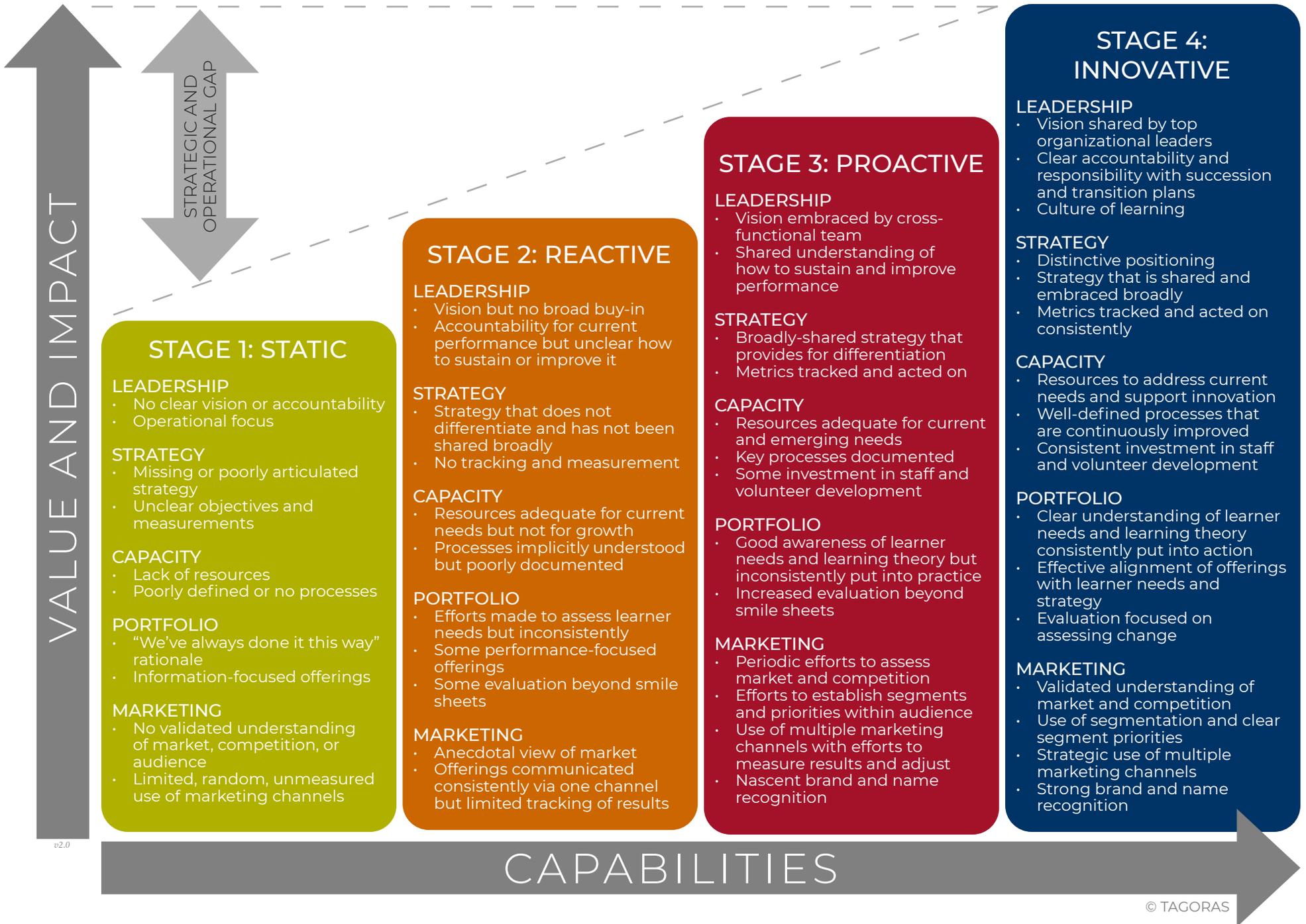
Text descriptions of each stage follow, and we provide a visual on the following page.

What is a learning business?

First, **a learning business exists to generate revenue** through selling learning and education experiences to a target audience.

Second, the **individuals working in the learning business recognize that revenue generation is a fundamental reason for the organization's existence.** That is, they are conscious of and focused on that goal as part of the organization's identity and part of their own identity. This second aspect is important because it distinguishes learning businesses not just by their activities but also by their mindset.

LEARNING BUSINESS MATURITY MODEL™



STAGE 1: STATIC



In Stage 1, the learning business is largely static. It does what it has always done with limited, if any, attempts to respond to changing needs or emerging opportunities. Relationships with learners are largely transactional, driven by securing registrations for whatever offering is the current priority, without a focus on developing longer-term relationships.

- **Leadership**
Organizations at this stage are characterized by a leadership vacuum. The learning business is operationally focused with no clear vision for achieving larger objectives with its learning and education initiatives. There is no clear accountability or responsibility for the success or failure of the learning business.
- **Strategy**
The strategy for the learning business, if one exists, is poorly articulated. Objectives are not clear, and no meaningful measurements and targets have been established.
- **Capacity**
The learning business lacks the human resources (whether staff or contract) and technology resources (whether internal or external) to address learning needs. The processes that should support the business are poorly defined or simply do not exist.
- **Portfolio**
The portfolio of learning products and services has been in place for some time without significant change. The learning business is marked by a “We’ve always done it this way” attitude, and no meaningful assessment of learner needs has been done. Offerings tend to focus on information (versus change in performance or behavior), and evaluations of offerings tend to focus on smile sheets (Kirkpatrick Level 1).
- **Marketing**
The learning business does not have a validated understanding of its market and the competitive environment. Its understanding of its audience is un-nuanced (for example, there are no segments and no priorities identified in the audience). Marketing methodologies are used in a limited, random, and unmeasured way. The learning business has a weak brand, if any.

In Stage 2, the learning business is largely reactive—at danger of responding to vocal minorities rather than proactively making decisions and working to influence the direction of learning in the field or industry it serves. In its day-to-day operations, the learning business remains largely transactional, though with some aspiration to cultivate longer-term learner relationships.

- **Leadership**
A sense of vision exists but is often driven by a single individual, without widespread buy-in. While there may be accountability for the current performance of the learning business, there is no shared understanding of how it will be sustained or improved over time.
- **Strategy**
A strategy exists—at least in the minds of those most involved—but it does not provide for effective differentiation. Moreover, the strategy has not been communicated and embraced, and it is not consistently tracked and measured.
- **Capacity**
The existing resources are more or less adequate for current needs but insufficient for investment in innovation and growth. Major processes are implicitly understood by those who use them, but they are poorly documented, if at all, and there is significant room for improving them.
- **Portfolio**
Some unquestioned offerings and things that are done “just because” still exist in the portfolio. Attempts are made to assess learner needs, but they are inconsistent and do not adhere to a strong methodology. Some offerings target learner performance (versus being purely informational), and some evaluation efforts target higher levels than reaction-focused smile sheets. Some technology is in place to aid with the development, delivery, or tracking of learning.
- **Marketing**
The learning business seeks to understand the market and competitive environment primarily through anecdotal means—e.g., input from committees and discussions with colleagues. The availability of learning offerings is communicated with some consistency through at least one channel—usually e-mail—but overall execution is weak, and the tracking of the results, if any, is limited.



The Stage 3 learning business has evolved to be more proactive in serving the market. It responds to the market in a more informed and thoughtful manner and may occasionally attempt to uncover and articulate learning needs not immediately apparent to its customers. A learning business in this stage is more collaborative, both in internal operations and in its relationships with customers.

- **Leadership**
A cross-functional team of people have a relatively clear vision for learning and education and share responsibility and accountability. (In learning businesses that are part of a larger organization, this cross-functional team may include people from outside the learning business.) While there is room for greater clarity, there is a shared understanding of how the learning business will be sustained and improved over time.
- **Strategy**
A strategy for the learning business that aims to provide effective differentiation exists and has been communicated to all stakeholders. Success metrics have been established, are tracked, and are responded to with some consistency.
- **Capacity**
Resources are adequate for current and emerging needs, and there is some investment in innovation and growth. All key processes are documented, and the learning business invests, at least periodically, in the development of its staff and volunteers.
- **Portfolio**
While the learning business has a good awareness of learner needs, it struggles to consistently translate that awareness into actions. Similarly, the learning business has a good awareness of current learning theory and evidence-based practices but could improve in applying that awareness more consistently. The importance of meaningful evaluation is embraced, and efforts are made to assess the impact of learning offerings beyond the smile sheet level but inconsistently.
- **Marketing**
The learning business periodically attempts to assess the market and the competitive environment and makes an effort to establish segments and priorities in the target audience. It thoughtfully uses multiple marketing channels with some ongoing attempts to measure the results and adjust. Some effort is taken to establish and maintain a clear brand for the learning business.



STAGE 3: PROACTIVE

In Stage 4, a learning business may be considered mature. While responsive to market needs, the learning business at this stage is also innovative in discovering learning needs not immediately obvious to its customers and developing effective approaches to elevating performance and achieving real impact across the field or industry it serves. *In short, these learning businesses lead learning.*

That said, the Stage 4 learning business must be careful to not become complacent. Maintaining a business at this level requires ongoing diligence and discipline, and there is always room for growth and improvement.

STAGE 4: INNOVATIVE

- **Leadership**
There is a clear, compelling vision for learning, and it is shared by top organizational leaders. There is clear accountability and responsibility, and succession and transition plans are in place. A culture of learning exists throughout the learning business and its audience.
- **Strategy**
A clearly articulated strategy provides distinctive positioning for the learning business and its offerings. The strategy is communicated, understood, and embraced by all stakeholders. Clear objectives and metrics are tracked and responded to on an ongoing basis.
- **Capacity**
The learning business has the necessary human resources and technology resources to address current needs and to support ongoing innovation and growth. Its well-defined processes are continuously evaluated and improved. The learning business consistently invests in staff and volunteer development.
- **Portfolio**
The learning business understands learner needs and effectively aligns modes of learning and teaching with those needs and its strategy. It works to meaningfully assess the change created by learning.
- **Marketing**
The learning business has a validated understanding of its market and the competitive environment, makes appropriate use of segmentation, and establishes segment priorities. It uses multiple marketing channels strategically and continuously measures the results. The learning business has a strong brand.



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 like 'ORBITA TERRARUM' visible in the upper left. The overall aesthetic is historical and navigational.

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.

