STAGE 1: STATIC
LEADERSHIP
• No clear vision or accountability
• Operationally focused
STRATEGY
• Poorly articulated, if at all
• Unclear objectives and measurements
CAPACITY
• Lack of resources
• Poorly defined or no processes
PORTFOLIO
• “We’ve always done it this way”
• Information-focused offerings
MARKETING
• No validated understanding of market, competition, or audience
• Limited, random, and unmeasured use of marketing channels

STAGE 2: REACTIVE
LEADERSHIP
• Vision but no widespread buy-in
• Accountability for current performance but unclear how it will be sustained or improved
STRATEGY
• Exists but doesn’t differentiate
• Hasn’t been shared broadly
• Isn’t tracked and measured
CAPACITY
• Resources adequate for current needs but insufficient for growth
• Processes implicitly understood but poorly documented
PORTFOLIO
• Efforts made to assess learner needs but inconsistent
• Some performance-focused offerings
• Some focus on evaluation beyond smile sheets
MARKETING
• Anecdotal view of market
• Offerings communicated with consistency via one channel but limited tracking of results

STAGE 3: PROACTIVE
LEADERSHIP
• Vision embraced by cross-functional team
• Shared understanding of how performance will be sustained and improved
STRATEGY
• Provides for differentiation and has been shared broadly
• Metrics tracked and acted on
CAPACITY
• Resources adequate for current and emerging needs
• Key processes documented
• Some investment in staff and volunteer development
PORTFOLIO
• Good awareness of learner needs and learning theory but inconsistently put into practice
• Increased focus on evaluation beyond smile sheets
MARKETING
• Periodic efforts to assess market and competition
• Efforts to establish segments and priorities within audience
• Use of multiple marketing channels with efforts to measure results and adjust
• Nascent brand for the learning business

STAGE 4: INNOVATIVE
LEADERSHIP
• Vision shared by top organizational leaders
• Clear accountability and responsibility with succession and transition plans
• Culture of learning
STRATEGY
• Provides distinctive positioning
• Has been shared and embraced throughout the organization
• Metrics tracked and acted on consistently
CAPACITY
• Resources to address current needs and support innovation
• Processes well defined and continuously improved
• Consistent investment in staff and volunteer development
PORTFOLIO
• Clear understanding of learner needs and learning theory consistently put into action
• Effective alignment of offerings with learner needs and strategy
• Evaluation focused on assessing change
MARKETING
• Validated understanding of market and competition
• Use of segmentation and clear segment priorities
• Strategic use of multiple marketing channels
• Strong brand for the learning business