

Learning Business Maturity Model™

version 1.1

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

We envision maturity as progressing through four stages:

- Stage 1: Static
- Stage 2: Reactive
- Stage 3: Proactive
- Stage 4: 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 and education businesses we have been involved with over our years of experience. In cases in which the learning and education business is part of a larger organization or company—as it is with many trade associations and professional societies—the model deals with these domains *in the context of the learning and education line of business*, not the entire organization or company.

- Leadership
How clear is the vision for the learning and education 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 throughout the organization? Are clear metrics established and tracked, and does the organization adjust strategy based on the data captured?
- Capacity
Does the organization 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 at multiple levels over time?
- Marketing
Is there a validated understanding of the overall market and competitive environment? Are appropriate marketing methodologies used consistently and tracked for effectiveness?

Profiles for the Four Stages of Maturity

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

We have developed an assessment that businesses can use to gauge their performance in each of the five domains. (See <http://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 within each of the domains, businesses will be able to identify the areas that need the most attention and work to move to the next stage.

For example, a learning and education 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. But 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.

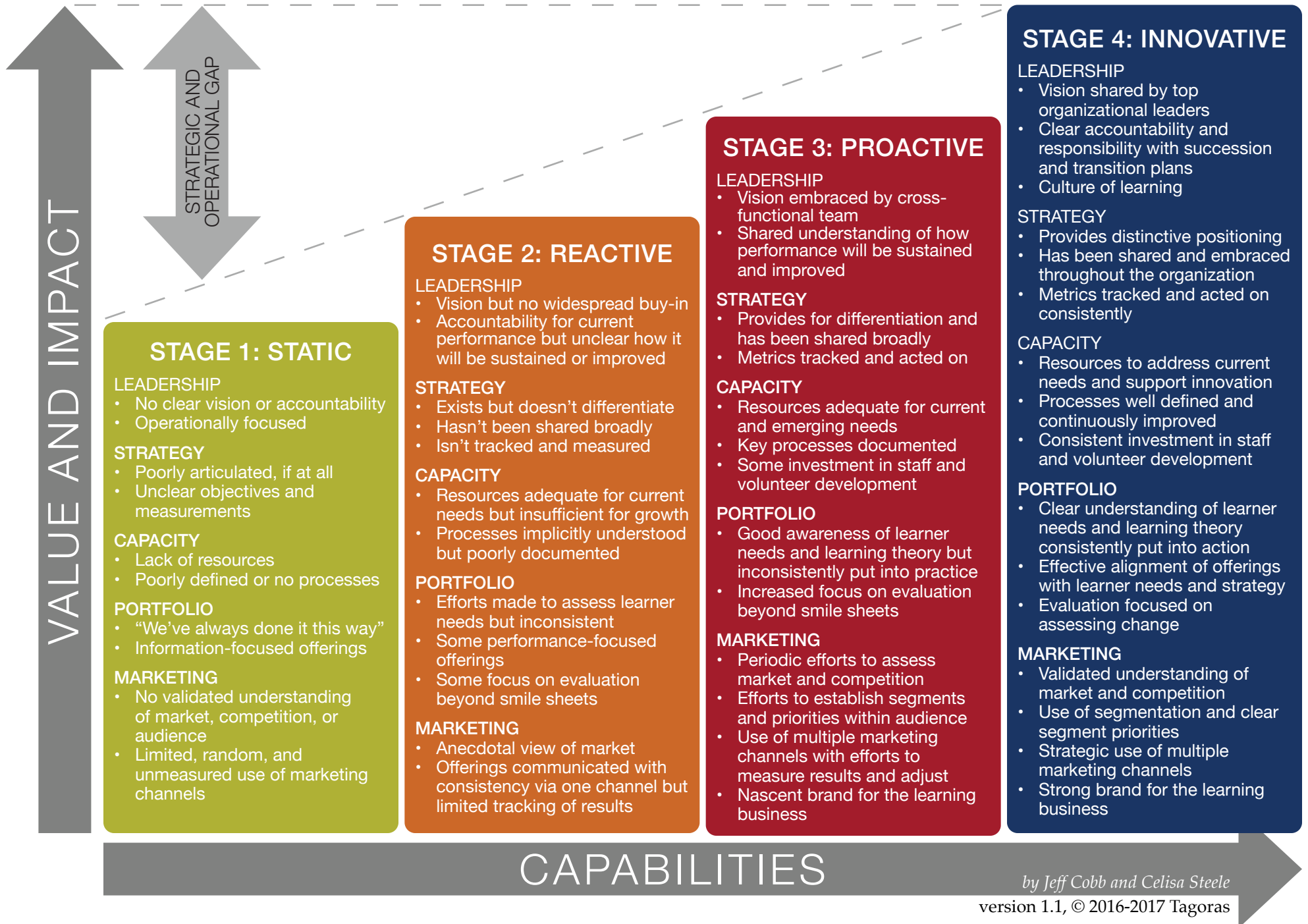
Text descriptions of each stage follow, and we provide a visual on the following page.

STAGE 1: STATIC

In Stage 1, the learning and education business is largely static. It simply 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. There is no clear vision for what the organization aims to achieve with its learning and education initiatives. The learning and education business is operationally focused. There is no clear accountability or responsibility for the success or failure of the learning and education business.
- **Strategy**
The strategy for the learning and education business, if one exists, is poorly articulated. Objectives are not clear, and no meaningful measurements have been established.
- **Capacity**
The necessary human resources (whether staff or contract) and technological resources (whether internal or external) to address learning needs are lacking. The processes that should support the learning and education business are poorly defined or simply don't exist.
- **Portfolio**
The portfolio of learning products and services has been in place for some time without significant change. A business at this stage is marked by a "We've always done it this way" attitude, and no meaningful assessment of learner needs has been done. Learning offerings tend to focus on

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information (versus change in performance or behavior), and evaluations of learning offerings tend to focus on smile sheets (Kirkpatrick Level 1).

- **Marketing**
The 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 business has a weak brand, if any, separate from the organizational brand (which is probably also weak).

STAGE 2: REACTIVE

In Stage 2, the learning and education 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 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 lone wolf, without widespread buy-in. While there may be accountability for the current performance of the learning and education 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 with the learning and education business—but it does not provide for effective differentiation. Moreover, the strategy has not been communicated and embraced, nor is it consistently tracked and measured.
- **Capacity**
The existing resources are adequate (more or less) 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 sacred cows 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 information), and some evaluation efforts target higher levels than reaction-focused smile sheets. Some technology is probably in place to aid with the development, delivery, or tracking of learning.
- **Marketing**
The business seeks to understand the market and competitive environment primarily through anecdotal means—e.g., input from board 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.

STAGE 3: PROACTIVE

The Stage 3 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. Businesses in this stage are more collaborative, both in internal operations and in their relationships with customers.

- **Leadership**
A cross-functional team of people share a relatively clear vision for learning and education and share responsibility and accountability. (In learning and education businesses that are part of a larger organization, this cross-functional team may include people from outside the learning and education business.) While there is room for greater clarity, there is a shared understanding of how the learning and education business will be sustained and improved over time.
- **Strategy**
A strategy for the learning and education business that aims to provide effective differentiation exists and has been communicated across the organization. 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 business invests, at least periodically, in the development of its staff and volunteers.
- **Portfolio**
While the business has a good awareness of learner needs, it struggles to consistently translate that awareness into actions. Similarly, the business has a good awareness of current learning theory and practices but could improve in putting those into practice 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**
Stage 3 businesses periodically attempt to assess the market and the competitive environment and make an effort to establish segments and priorities within the target audience. They make thoughtful use of 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 and education business.

STAGE 4: INNOVATIVE

In Stage 4, a learning and education business may be considered mature. While responsive to market needs, organizations at this stage are also innovative in discovering learning needs not immediately obvious to their customers and developing effective approaches to elevating performance and achieving real impact across the fields and industries they serve. *In short, these businesses lead learning.*

That said, these businesses must be careful not to rest on their laurels. Maintaining a business at this level requires ongoing diligence and discipline, and there is always room for growth and improvement.

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

The Learning Business Maturity Assessment™

We have developed an assessment that businesses can use to gauge their performance in each of the five domains as well as to determine their overall stage. For access to the Learning Business Maturity Assessment™, visit <http://www.tagoras.com/maturity>. Learning and education businesses will be able to use their assessment results to identify the areas that need the most attention and work to move to the next stage of maturity.

Helping to Shape the Maturity Model

We view the Learning Business Maturity Model™ and the related assessment as works in progress. We aim to improve both over time based on feedback from organizations that use them. Please send your feedback to support@tagoras.com. We will respond to feedback we receive and, as appropriate, incorporate it into future versions.