

# Learning Business Maturity Assessment™

*version 1.1*

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

The maturity model and the maturity assessment are intended specifically for market-facing organizations or units within such organizations that focus on lifelong learning, continuing education, and professional development. They are not, for example, intended for corporate training departments or degree-granting programs. (See <http://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 businesses determine their overall maturity stage. The scores for each of the domains will help businesses identify the domains that need the most attention and work 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 who should be 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 and education business is part of a larger organization, you should include stakeholders from the larger organization, who are not directly part of the learning and education business.

A low number of potential assessment-takers may tell you that you need to spend time in the future educating staff and others to grow the pool of people aware of the learning and education business.

Identified stakeholders should take the assessment independently to not influence one another's answers. Then the individual results should be averaged to determine a 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 the results truly reflect that maturity of your 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 even 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 and education 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 and education 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—for cases where they truly do not have any information on which to assess the statement and so cannot give another 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. In the final row list the total of the numeric values 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 and education business.

Information on interpreting the scores is included after the assessment, the section titled “Interpreting the Assessment Scores.”

Assessment-takers should respond to *all* questions in the assessment: the two demographic questions as well as all 40 statements.

## The Assessment

### DEMOGRAPHICS

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

\_\_\_\_\_ *Yes*

\_\_\_\_\_ *No*

2. Which best describes your role in our organization?

\_\_\_\_\_ *Leader*

\_\_\_\_\_ *Manager*

\_\_\_\_\_ *Individual contributor*

## LEADERSHIP

1. A clear vision has been articulated for our learning and education business.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
2. The vision for our learning and education business has been communicated, understood, and embraced throughout the organization.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
3. One or more individuals in our organization are clearly responsible for the operations and success of the learning and education business.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
4. Those responsible for the operations and success of the learning and education business are held accountable.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
5. We have a culture in which people are willing to take risks, fail, improve, and grow rapidly.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
6. A succession plan is in place for key roles in managing and leading the learning and education business.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
7. We consistently strive for diversity and inclusion—e.g., in our staff, our contract relationships, and the input we receive from our members and broader audience—in pursuing the vision for our learning and education business.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
8. The leadership role for the learning and education business is commensurate with other major area of the overall business (e.g., if there is a CIO, there should be a CLO).						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
<i>Add the numeric values for your responses to the eight statements identify a score for this domain.</i>						_____

**STRATEGY**

1. There is a clearly articulated and documented strategy for our learning and education business.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
2. The strategy clearly aligns with and supports the vision for learning and education as well as the overall organizational strategy.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
3. The strategy for the learning and education business provides distinctive, differentiated positioning for the learning and education business and its offerings.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
4. The strategy has been communicated, understood, and embraced throughout the organization.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> 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> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
6. Clear metrics to gauge the success of the strategy have been articulated and are tracked consistently.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
7. Results from the tracking of metrics are shared with relevant stakeholders and responded to on a consistent, ongoing basis.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
8. The learning and education business strategy is revisited and adjusted on a regular basis.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
<i>Add the numeric values for your responses to the eight statements identify a score for this domain.</i>						_____

**CAPACITY**

1. The learning and education business has or has access to all necessary human resources (staff or contract) to address current needs.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
2. The learning and education business has ample resources to support innovation and growth.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
3. Learning and education business staff members have a strong, baseline knowledge of adult learning principles and methodologies.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
4. All key business processes are well defined and continuously evaluated and improved.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
5. The learning and education business consistently invests in professional development opportunities for staff.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
6. Learning and education business staff members have a working level of domain expertise for key topics and issues in the field or industry the business serves.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
7. The learning and education business provides a well-defined and documented approach to helping subject matter experts deliver high-quality educational experiences.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
8. The learning and education business has appropriate access to and makes strategic use of technology to support the development, delivery, and tracking of its offerings.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
<i>Add the numeric values for your responses to the eight statements identify a score for this domain.</i>						_____

## PORTFOLIO

1. The products and services offered by the learning and education business clearly align with the vision and strategy articulated for the business.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
2. The products and services offered by the learning and education business are based on a validated understanding of learner needs.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
3. The products and services offered by the learning and education business employ modes and methods that clearly align with learner needs.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
4. The learning and education business tracks and assesses the impact of key products and services on learners over the longer term.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
5. The learning and education business tracks and assesses the impact of key products and services on its target field or industry over the longer term.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
6. The products and services provided by the learning and education business offer clear ways for learners to assess their own learning achievement.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
7. The learning and education business regularly experiments with new media and technologies for delivering and facilitating learning experiences.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
8. The learning and education business regularly experiments with new models and formats for delivering and facilitating learning experiences.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
<i>Add the numeric values for your responses to the eight statements identify a score for this domain.</i>						_____

**MARKETING**

1. Learning and education staff members have a solid working knowledge of fundamental marketing principles and practices.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
2. The learning and education business has identified and regularly tracks key sources of information about customer behavior and needs.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
3. The learning and education business has a validated understanding of the overall market and competitive environment.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
4. Appropriate, up-to-date marketing methodologies are used consistently to attract and convert customers for the learning and education business's products and services.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
5. The marketing methodologies employed by the learning and education business are consistently tracked for effectiveness.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
6. The learning and education business has a clearly articulated and understood process for pricing its offerings.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
7. The learning and education business has a clearly articulated and understood branding strategy for the business as well as for key offerings.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
8. The target audience perceives the learning and education business as a leader of learning and education in its field or industry.						
<i>Strongly disagree</i> 0	<i>Disagree</i> 1	<i>Neutral</i> 2	<i>Agree</i> 3	<i>Strongly agree</i> 4	<i>No information</i> NI	_____
<i>Add the numeric values for your responses to the eight statements identify a score for this domain.</i>						_____

**OVERALL SCORE**

Leadership	Strategy	Capacity	Portfolio	Marketing
Add the scores for each domain to identify an overall score.				_____

**Interpreting the Assessment Scores**

Both the domain-level score and the overall score can help you understand how your learning and education 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 stakeholder 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 and education 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 and education 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 should be 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 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 and education 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 a valid reading.

When you average stakeholders' responses, the no-information responses may or may not be an issue of concern. As a rule of thumb, we suggest you scrutinize statements where you have more respondents indicating 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 or, depending on the ratio of no-information responses to substantive responses, areas where you should not trust the resulting average of assessment responses.

In cases where you have a significant ratio of no-information response, 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 extra wary of the average score associated with that statement.

### **CONSOLIDATING RESULTS**

To help you consolidate the assessment responses from your stakeholders, we've created 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 response 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.

### **Helping to Shape the Maturity Model and Assessment**

We aim to improve both the Learning Business Maturity Model™ and the assessment over time based on feedback from organizations that use them. Please send your feedback to [support@tagoras.com](mailto:support@tagoras.com). We will respond to feedback we receive and, as appropriate, incorporate it into future versions.