

## Linking Learning to Success Discussion Guide

### Best Practices

When managers and their employees discuss a learning plan before a workshop and agree to goals for applying skills and knowledge afterwards, they strengthen the link between learning and success. This guide supports managers and employee learners who seek a return on investment for development efforts which contribute to both individual and team success.

The employee learner starts the process by scheduling the meetings with their manager, downloading the discussion guide and recording the outcome of both conversations. As learning is applied to the job, both manager and employee stay in touch and track progress towards success for the individual and for the team.



	Manager Role	Employee Learner Role
<b>Before a Workshop</b>	<p><b>Plan:</b></p> <ul style="list-style-type: none"> <li>• Discuss learning priorities and how they can be applied to the job</li> <li>• Ask what support employee needs in order to be free to learn without distractions.</li> <li>• Agree meet again after the workshop</li> </ul>	<p><b>Prepare:</b></p> <ul style="list-style-type: none"> <li>• Review objectives, prepare the discussion guide and schedule a meeting with your manager.</li> <li>• Discuss expectations and agree on learning priorities with your manager.</li> <li>• Complete any assigned pre-work.</li> <li>• Schedule a follow up meeting with your manager within 2 weeks after the workshop.</li> </ul>
<b>During a Workshop</b>	<p><b>Support:</b></p> <ul style="list-style-type: none"> <li>• Follow through on needed support</li> </ul>	<p><b>Participate:</b></p> <ul style="list-style-type: none"> <li>• Eliminate distractions and commit to engage fully in all learning activities.</li> <li>• Reflect and record your ideas to improve retention.</li> </ul>
<b>After a Workshop</b>	<p><b>Monitor and measure:</b></p> <ul style="list-style-type: none"> <li>• Identify and agree on the activities the employee will do to apply skills.</li> <li>• Mitigate barriers and offer support.</li> <li>• Monitor progress and hold your employee accountable for sustaining positive results.</li> </ul>	<p><b>Apply and measure:</b></p> <ul style="list-style-type: none"> <li>• Meet with your manager to develop a plan for applying what you learned.</li> <li>• Create action goals to apply learning and collect data to track progress.</li> <li>• Communicate with your manager about your progress.</li> </ul>

## Linking Learning to Success

### Discussion Guide- *EXAMPLE*

Employee Name: JANE BLUEHEN

Workshop/Activity Title: COMMUNICATING FOR EXCELLENT CUSTOMER SERVICE

Date(s): OCT 10<sup>TH</sup>, 9-11AM

#### Meet before the workshop- Learning Plan

Questions for discussion:

- What are the learning priorities and how will they impact the employee's and the team's success?
- What support is needed?

Learning Plan	Notes
Learning priorities	<i>LEARN TO COMMUNICATE MORE EFFICIENTLY AND PROFESSIONALLY IN PERSON, BY EMAIL AND OVER THE PHONE</i>
Expected impact	<i>MORE CONGENIAL INTERNAL COLLABORATION, REDUCED COMPLAINTS FROM EXTERNAL CUSTOMERS</i>
Support needed	<i>COVER JANE'S SHIFT AT SERVICE DESK- TRADE LUNCH HOUR WITH JOHN.</i>
The follow-up meeting is scheduled for: <i>OCT 22, 10-10:30 AM.</i>	

#### Meet after the workshop- Development Plan

Questions for discussion:

- What were the key "take-aways" from the workshop?
- How will learning be applied to the job and success measured?

Application Plan	Notes
Skills to apply	<i>USE STANDARD PHONE GREETINGS AND EMAIL TEMPLATES</i>
Action steps	<i>REVISE TEMPLATES FOR ROUTINE EMAIL AND PHONE COMMUNICATION FOR USE BY DEPARTMENT WHEN DEALING WITH EXTERNAL CUSTOMERS</i>
Barriers or obstacles	<i>NEED QUIET TIME AWAY FROM SERVICE DESK DUTIES TO DEVELOP TEMPLATES. EXTRA TIME TO TRAIN STUDENT WORKERS ON NEW PROCESSES.</i>
Define and measure success	<i>INITIATE AT LEAST 90% OF ROUTINE COMMUNICATION USING TEMPLATES. INCREASE AVERAGE SERVICE SATISFACTION SURVEYS TO AT LEAST "ABOVE AVERAGE" RATING BY 3/30/17.</i>
Support needed	<i>REVIEW AND APPROVE TEMPLATES. COMMUNICATE CHANGES TO ALL.</i>

## Linking Learning to Success

### Discussion Guide

Employee Name: \_\_\_\_\_

Workshop/Activity Title: \_\_\_\_\_ Date(s): \_\_\_\_\_

#### Meet before the workshop- Learning Plan

Questions for discussion:

- What are the learning priorities and how will they impact the employee's and the team's success?
- What support is needed?

Learning Plan	Notes
Learning priorities	
Expected impact	
Support needed	
The follow-up meeting is scheduled for:	

#### Meet after the workshop- Development Plan

Questions for discussion:

- What were the key "take-aways" from the workshop?
- How will learning be applied to the job and success measured?

Application Plan	Notes
Skills to apply	
Action steps	
Barriers or obstacles	
Define and measure success	
Support needed	