Administrate

EXECUTIVE TRAINING INSIGHTS

Business Intelligence Strategies for Training Organizations

The Purpose of this Ebook and How to Use It

You're likely reading this because your training team is looking to take a much greater interest in Business Intelligence (BI), or because you want to amplify what you're doing already. Or, maybe you're just here because you're trying to get started, and want to know more about how the practice of Business Intelligence has evolved within the training industry, and what your team might be able to accomplish with this practice moving forward.

No matter why you've decided to get this ebook, we've aimed to be very practical and provide your training team with strategic insight into an ever evolving landscape within the training industry. To that end, we've sought to accomplish three outcomes for your training team:

- Provide your team with an outlook of what Business Intelligence looks like in the training industry today, and the adaptations made to reach its present state.

- Give your training operations some action steps, so you can not only get started with intelligent reporting, but also amplify what you're already doing.

- Offer insights from practitioners in the enterprise training field that can be leveraged to give you a unique perspective into what Business Intelligence looks like for training leaders today.

We aimed to showcase what's possible today with Business Intelligence for enterprise training, the tools that are available, and how learner analytics can inform operational excellence in talent retention, customer satisfaction, valuable partnerships, and more, with deep insight from training professionals who live in this world daily.

To help contextualize what's discussed, Kevin Streater, a long-time partner and customer of Administrate, and the Vice President of ForgeRock University at ForgeRock, is going to provide his insight into how BI has helped his training operations team lead business decisions. John Peebles, CEO of Administrate, is also going to jump in here and there to dole out his experience with BI for training.

Meet your conversation partners:

Kevin Streater

Vice President of ForgeRock University at ForgeRock

Kevin Streater is a leader in the IT Learning and Development industry and currently the Vice President of ForgeRock University at ForgeRock, a leader in digital identity and access management. He is also a Director of CEdMA (Computer Education Managers Association) and known for innovating unique learning and development initiatives in response to learner analytics. Prior to ForgeRock, Kevin spent nearly 20 years in various service delivery, project management, and training leadership roles at Sun Microsystems.

John Peebles

CEO of Administrate

John Peebles is the CEO of Administrate, a training management platform that empowers leading enterprise learning and development operations around the globe. Prior to Administrate, Mr. Peebles helped found Fort Lauderdale based Sentry Data Systems, where he served as Chief Information Officer and VP of Operations while it grew to more than $30 million in revenue within five years. He is passionate about education, teamwork, technology, and mental health in the workplace, and often speaks on these subjects around the world.

How to Use the Ebook

John and Kevin will be providing their expertise around Business Intelligence within the training industry throughout this ebook. You'll also notice **Inflection Points** throughout where you and your team can dive deeper with some relevant questions that come up as the ebook narrative progresses. Finally, if you're looking to get started with Business Intelligence immediately, you can just jump straight to our QuickStart BI offering at the end of the ebook.

Let's get started.

Metrics, Meaning, & Moneyball

Metrics, Meaning, & Moneyball

I believe that fundamentally, people love to learn.

A love of learning is why most of us find ourselves working as training professionals – we believe that education is one of the most powerful forces for change that we can bring to bear on our world. But how do we know we've made a difference? How can we actually measure the impact we've had?

Measurement of learning impact is something we've spent a long time thinking about here at Administrate because it's a top priority for our customers. During the last decade we've spent engaging with this problem, we've developed a thesis as to why learning analytics are so difficult to come by, and we believe that a methodical, thoughtful approach to building a discipline of Business Intelligence within learning organizations can have a dramatic and outsized impact.

These techniques aren't new, but they have remained elusive in our industry. Most learning leaders admit they don't have access to the following:

1. A comprehensive data model that includes both business metrics and learning metrics.
2. Tooling that supports rapid interrogation of data and rapid iteration of questions.

Without this foundation, learning teams and leadership are often unable to demonstrate how learning impacts broader organizational outcomes. They know they're having an impact, but struggle to articulate it, particularly when compared to other highly metricized functions like sales, customer success, or marketing.

> *A quick but effective litmus test for learning teams: are your metrics and reports learner-centric, or organization-centric? In other words, if you're primarily focused on learner activity, which is the natural focus of most learning tools (and totally understandable, by the way), you may be missing a critical opportunity to drive toward organizational goals.*

I think a lot about the book (and, later, movie) *Moneyball*, which follows the story of how modern analytical techniques were applied to a pen and paper sport that was steeped in tradition, and resistance to new fangled techniques. Our playing field is not so different from that of the baseball diamond, and in an age where we must do more with less and justify every dollar spent, our strategy and tactics must change.

Focus on organizational goals requires new tools, new thinking, and a realignment of priorities that might be uncomfortable but will pay major dividends over time. Measurable impact will create a positive feedback loop that can be directed toward any problem, and we'll know, not just feel like, we've made a difference.

Analysis, Impact, & Enterprise Training

When John reached out to me to collaborate on a guide around Business Intelligence for enterprise training, I was intrigued, to say the least.

At ForgeRock, and by extension [ForgeRock University](), crafting a metrics-supported narrative is paramount to how we demonstrate the impact of our training program on the business as a whole. I truly believe in the importance of training as a leadership function, and in its ability to lead business decisions instead of just reacting to them; however, being able to measure the impact of the training program on the overall business is key in leading that decision-making. And, unfortunately, many training teams–including ours, originally– struggle to reveal the leading indicators of the impact they know they're achieving.

I believe John brings up some very critical points when it comes to *Moneyball* and bringing new ideation and different fields of view to an industry that is largely steeped in tradition when it comes to the analysis of training operations. This industry is on the cusp of something holistically transformational, and at ForgeRock we believe wholeheartedly in the training function and its ability to inform data-driven decision making. Business Intelligence for enterprise training is at the heart of what we do, and I cannot overstate the impact this field of view has had on our business, which is why I look forward to bringing the insights our training team has uncovered about our business into perspective within this guide.

At ForgeRock, we had the rare opportunity to create a new customer training operation from scratch. Initially, ForgeRock had been using a range of off-the-shelf tools to manage class registration, payment, and event management. The upside to this was that the fees were minimal and they were incurred per event. The downside was that there were no metrics, and no means to forecast resource requirements. So, we began searching for ways to build an EdTech infrastructure that would stand the test of time, and continue to scale as our business grew rapidly.

Customer training at ForgeRock wasn't just a nice-to-have, it was pivotal to the company's early success and growth. Customers could always just download an evaluation version of our product and use it themselves after following along with the available documentation. In-depth certification and training, therefore, was a key differentiator when engaging with enterprise customers, and the quality of this training was more central to the product offering than normal.

Once an organization reaches a certain size you have to take control of your operations and start implementing business processes that support you in gathering insights about your future needs. Organizational size is not the only consideration, although it is the most obvious, the projected growth rate of the organization is even more important. ForgeRock had aspirations to grow quickly and consistently for the next decade, and this would prove to be a more impactful stressor on our systems, people, and resources than any other factor. In other words, we needed to know that we could invest in a solution that would not only work at scale, but help us achieve scale in a very small amount of time.

> *When you have learner and business metrics in the same data model, you can gain deep insight into the holistic operation and identify areas that need additional focus, rapidly. This is where the true value of a training operation begins to take form.*

When researching the market, it became clear that learning technology providers focus on learner experience and learner metrics (which is to be expected), and business platform providers focus on financial and resource management (also to be expected). The real value to running an effective learning operation is to have the ability to blend both.

In reality, the line between the training program and business objectives is wholly predicated on an ROI that training operations can rarely demonstrate: how does our training team impact our organization's financial goals? When you invest in system infrastructure that integrates your critical systems, this type of insight is readily available, and the training operations can iterate and interrogate this data so that it consistently stays in lock-step with the wider business objectives.

Are You Measuring Training Activity, or Moving Your Business Forward?

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As leaders in training, we find ourselves in a rapidly evolving industry, directed by a predictable evolution and fueled by the immediacy of unknowns in our world that are shaping the way we do business, and the ways we are able to interact, communicate, and learn.

The path that we are on is not unfamiliar. Even though it is new to learning and development (L&D), Business Intelligence (BI) reporting for corporate learning and enterprise training offers training teams the opportunity to develop a pattern of analysis and deep insight with their data. We've seen this pattern before in other aspects of business, and even in our culture at large.

Perhaps the greatest example of the evolution of Business Intelligence, for the purposes of this guide, is the genesis of what was happening at the turn of the 20th century in New York City, and other large metropolises.

Moments of Learning vs. Organizational Dynamics

Photography had reached its zenith. It was the perfect medium to capture moments in time, but it belied a sense of what it meant to be truly human: to be in motion and to experience more than just the moments solidified in time. This is when "actualities" were born, video clips that captured the daily life of ordinary people going about their business. These actualities were the first insight people had into what it looked like to see "real life" in context, through moving images.

While a source of great curiosity, actualities merely captured activity on film, not context, not stories. But, this crucial pivot point of moving from activity to storytelling happened when the art form of documentaries was born. Suddenly, life was shared in the context of a story and people could use documentary film to learn about the past in order to build a better future.

> *"I treat the photograph as a work of great complexity in which you can find drama. Add to that a careful composition of landscapes, live photography, the right music and interviews with people, and it becomes a style." - Ken Burns*

These moments captured in time, frozen in place, became organized, directed stories that revealed socially moving aspects of human nature. Pictures were mobilized to create a narrative that told the story of how human beings interact with one another, and their environments.

Mobility Makes Meaning Visible

In the evolution of actualities, static images captured became data movement as movies emerged. No longer frozen images, people could watch, relate, and attach meaning as themes were revealed in captured

experiences. Stories began to be told about how those themes were relevant to a global awareness of what it meant to discover a connection between daily life and a greater human experience. Had photography and storytelling remained stuck in actualities, we would have a record of events, but no learning of experience or record of change.

This is the crossroads in which we find ourselves as training leaders: will we simply continue to record and report activity, or will we dive into the deeper story to learn and shape the future? Business Intelligence makes this growth possible.

However, while marketing, sales, and finance teams have access to tools that help them tell the story of how their data impacts the greater business, learning and development teams have largely had to hypothesize and spend hours creating reports to try and demonstrate how training impacts the business.

No longer.

It is time to adopt the rigor and clarity that BI drives for L&D. Just as in other disciplines, the evolution of technology has been a game-changer. The tech for L&D is here now, and it is possible to leverage EdTech to lead data-driven decisions.

Transform Your Data

Tell Your ROI Story with the Right Reporting Architecture

In as little as 30 days, your training team can implement Business Intelligence reporting with QuickStart BI from Administrate.

- Course Viability

- Course Occupancy

- Learner Engagement

- Instructor Performance

- Account/Department Engagement

- Revenue Over Time

- Promo Code Utilization

Your training team can move beyond activity reporting and into gathering metrics that inform data-driven decisions to move your business forward with QuickStart BI implementation.

> Get Started with Quickstart BI

Growing Toward Business Intelligence

Always, We Begin Where We Are

In the recent report, [2020 Business Intelligence Market Study](#)–produced by [Dresner Advisory Associates](#)–there are some key findings that provide insight into how L&D teams look at BI today.

For example, there is a [21% growth attributed to HR teams prioritizing the importance of Business Intelligence](#) in 2020. Still, more than 50% of HR teams responded saying they "rarely" or "never" drive the adoption of BI in their organizations.

This indicates that some companies might have a limited understanding of the value for HR teams, and their training function, as they lack access to these tools.

KEVIN'S INSIGHT

Connecting Learning Metrics and Organizational Objectives

As I alluded to earlier, and as John touched on when discussing the tech available to department functions within companies, organizations tend to lead with financial and resource management requirements when looking at their system needs, hence the importance of Enterprise Resource Planning (ERP) platforms. Meanwhile, learning operations prioritize the platforms that ensure learners have the best experience possible, and focus on gathering metrics that speak to that learner experience.

In a world dependent upon adaptability, and mired in constant change-management, it is important to bring these two metrics narratives together, even though L&D teams often face challenges when trying to connect the dots between the two.

> *Training teams play a key role in supporting enterprise objectives, while organizations are focused on maximizing sales results and reaching financial goals.*

As organizations align more with a customer, employee, and partner success agenda, the integration of business and learner metrics is becoming increasingly relevant to the health of the business overall.

How BI Tells the Story:
The Attributes of Business Intelligence

Business-relevant reporting should support your team in telling the story of how your training program impacts the entire business. Learn more about the attributes of BI for enterprise training below:

MEASURABLE

It's time to change your perspective on what's measurable. You don't have to limit your understanding of "numbers" to quantitative data. By the same token, qualitative impact doesn't have to come at the sacrifice of quantitative data. That means looking for trends wherever they can be found, and asking questions against those trends, once identified.

REPEATABLE

Trends are repeated, and so is the way in which you capture data about them. Focus your data capture tools on identifying the trends that will be real levers for change. The greatest indicator of employee and customer engagement, alike, is often how people interact with your training. Make sure you're leveraging repeatable insight that's actionable.

ACTIONABLE

You should be able to take the data you're referencing, whether it's qualitative or quantitative, and use it to take an insightful action that is driven by understanding what that data means to your company. As a learning professional, actionable data can inform decision-making across teams and help to define continued growth for your organization.

REPORTABLE

How easy is it for you to report on the data you capture? Have you taken the time to create reports that are architected to provide insights about what the data means? Many programs fail to report deeply because it's too difficult to report on data from multiple sources. The Business Intelligence you provide about training depends on how easily it's shared.

RELATABLE

Training intelligence can be a force for good in driving the business forward. How does the reporting you're sending to key stakeholders within your organization relate to other growth initiatives, or tell a story about what it means for your learner to engage in a certain way? Align your training program measurements with your organization's strategic plan for optimal results.

ORIENTED TO ROI

It is time for learning & development to move out of the cost center and into the profit center mindset. Training is more than just a function of the business that must be served. It plays a vital role in how your company will approach change, new markets, and longevity. When you can connect training to profitability you'll achieve the impact you set out to make.

As a function, learning and development teams have a profound impact on the business as a whole. There are certainly correlations between onboarding and talent retention, customer training and customer adoption of services, and partner training and a partner's competency in relaying the value of your product or service to interested parties, to name a few.

But, how do you demonstrate the correlations between your training initiatives and the impact on your business?

KEVIN'S INSIGHT

How ForgeRock Identifies Opportunities for Business Impact

When looking at the business data, you want to identify trends and actionable insights that initiate change. The change itself could be a minor adjustment in how data is recorded or it could consist of major organizational/functional reorganization.

All change projects are usually dependent upon the external factors that initiate them, but those factors are best influenced by your own business metrics.

Using a data model that combines business and learning data, it is possible to see how learning influences business dynamics. For example, ForgeRock places customer satisfaction at the heart of its success dynamics. Time to Value (TTV) in deploying a ForgeRock-based solution is one of the focal metrics we measure when considering customer satisfaction. Part of the value chain leading to Time to Value is our ability to identify skilled resources, which is centered on competent partners who can support our implementation of a ForgeRock-based solution quickly and correctly.

Connecting training activity and exam success to account activity helps us identify potential problems early. Similarly, an increase in support tickets raised by an account usually indicates a skills gap and, when matched with the spend of our learning operations, we are able to easily identify opportunities for improvement.

Engineering Your Data for Impact

At Administrate, we like to think of Business Intelligence as a journey–much like the journey from photo to documentary—whereby the great informational analysis you're already doing becomes insight that identifies themes, becomes intelligence that connects those themes to something bigger.

In other words, you're probably currently doing a lot of reflection on your data with your team, but your conclusions on that analysis might not be rooted in data, but more in hypotheses.

> *Intelligent training analytics allow you to engineer your data to tell the story of how your training program is impacting the bottom line of your business.*

That means you no longer have to worry about going to your next board meeting with hypothesized conclusions about what your data means. You'll be able to demonstrate, in no uncertain terms, the ROI of your training program.

Check Your Foundation

This journey should not only evolve with the data you capture internally, but also be informed by certain socioeconomic indicators that can either directly, or indirectly, influence your L&D function.

Inflection Point: How do learners like to engage with training? How will that inform your training delivery mechanisms? What do learners value when growing professionally? How does this influence your learner recognition initiatives?

When you loop in external influencers with the data you're capturing internally, training becomes a function of leadership and preemptive preparation–it's no longer reactive.

What Metrics Should Your Training Program Prioritize?

Before you begin thinking about the specific metrics your training program should focus on capturing,

remember first that the goal of each department within an organization is to contribute to the business as a whole. As such, prioritizing which metrics to focus on should really come down to one question: are the metrics you're capturing strategically aligned with key business objectives, both in the present and as your organization scales?

Intelligent Reporting Impacts Onboarding and Learner Engagement

We've seen organizations focus on improving their onboarding process in order to cut down on employee churn; they leveraged Business Intelligence reporting to pinpoint the causes and stressors of employee turnover, identify where in the onboarding process they were seeing the most turnover, and create a plan that eventually led to a nearly 50% reduction in employee turnover.

Another customer took insight from PESTLE indicators to identify a trend in training: learners want recognition for their achievements, and to be able to share these achievements in their networks. So, they innovated and created learner paths and attached digital badges to each stage of the pathway, recognizing their learners for their achievements with a badge as they progressed.

> *However, with BI, they noticed learners weren't claiming or sharing their badges at the same rates as the industry norm. So, they worked with Administrate to automate the distribution of their credentials, and now their claim and share rates are way above the industry average.*

In the first instance, Boston Whaler was scaling rapidly, and onboarding 6-12 new employees every week. They needed to improve their onboarding process and be able to identify ways to iterate on that onboarding process so they could consistently retain the best talent.

In the second instance, ForgeRock University was trying to increase the impact of their curriculum, and ensure partners were well equipped to support customers in implementing their complex software. They wanted to ensure their partners had the aptitude necessary to support customers with software implementation, and badges were a great way to recognize partner competency. The idea to distribute those badges automatically came as a direct result of intelligent training measures.

KEVIN'S INSIGHT

Include Socioeconomic Indicators of Adaptability

ForgeRock is a partner-centric organization. When we have skilled partners, we have successful projects. As we looked at our learning metrics, and how they related to operational excellence, it became increasingly apparent that partners were unable to find their way through the learning curriculum.

So, rather than simplifying the curriculum, we made our learning more accessible. A key business strategy for our company is to have a large virtual "bench" of skilled implementers of our SaaS within our partner network. When we looked at our learning records, we could see a transactional approach to learning. A course was

taken, but our learners weren't completing their certification after taking that course, and–more importantly–they weren't progressing to more advanced topics that would make the implementation of our software easier for them.

So, we leveraged PESTLE indicators within the learning and development field to identify areas where we could improve our partner learning, and thus improve customer satisfaction with our products.

> *It was clear there was a significant move being made toward integrating life-long learning models into technical education, and that digital credentialing was an enabler for this.*

Life-long learning success is based on continual, regular feedback after each activity as learners move through successively more advanced learning. ForgeRock University developed a progressive digital credentialing model of learning to stay in lock-step with these changes in the L&D industry, and linked these credentials with our learning management system so we could empower learners by recognizing them for their professional growth. Now, our learners receive instant feedback, recommendations about future learning opportunities and, in turn, the credentials that prove their steps toward professional growth within the digital identity sphere.

Using Business Intelligence reporting, we were able to identify the business metrics that demonstrated an increase in certification attempts, and more learners completing their learning paths. These results delivered increased customer satisfaction and time to volume, which were measurable results that met our organization's requirements.

Automating the distribution of these digital credentials also came as a direct result of us using insightful reporting to poll our data. By doing so, we were able to identify an opportunity to make recognizing learners–for their progression through our content–as seamless as possible.

❯ Get the Case Study

Connect to Your Bottom Line, Whatever It Is

The point is, in both instances, each training program worked to create initiatives that would directly impact the bottom line of their business. For your organization, it may look different.

> **Inflection Point:** What are your team's leading indicators of success? What are the data points you need to capture in order to ensure you're connecting your data points to key performance indicators of success for your business?

Perhaps you want to focus more on customer training so you can ensure easy adoption of your services and product, and cut down on customer churn. You'll capture metrics that correlate renewals with customer training engagement, so you can demonstrate, with data, what impacts customer longevity and customer success.

Or, maybe you need to ensure your leadership team has the skills they need to manage change quickly and effectively, and you're looking to understand the metrics that demonstrate the effectiveness of your third-party training.

You might even work in a highly regulated environment, and you need to be able to identify the gaps in your compliance reporting so that audits are no longer a pain-staking process.

What 2020 Training Industry Trends Say About the L&D Function Moving Forward

Explore Data from More Than 170 Organizations Serving 660,000+ Learners

> **Get the Report**

Enterprise training BI is not cut and dry—the metrics you focus on capturing are going to be unique to your operation. However, they should always focus on your bottom line business objectives because there is no better way to demonstrate the value of your training program from an ROI perspective.

Iterate From There

There is no such thing as a failed project. Your training program will always learn from the initiatives you implement, particularly if those initiatives are geared toward understanding the insights and intelligence behind the metrics you're gathering. More importantly, your data will evolve over time, and the more time you

dedicate to capturing the same metrics over a longer period of time, the more likely you are to have data that transcends socioeconomic impact given over short periods of time.

In other words, focusing on how your data changes quarter-by-quarter, and capturing that data over quarters year-by-year, is going to help you in completing a narrative that speaks to how your data can continually impact the bottom line of your business.

KEVIN'S INSIGHT

Quarterly Reports With Actual Insight (Really)

One of the things we've done at ForgeRock to endorse the adoption of Business Intelligence within our training team is to create a quarterly report that tracks key training metrics we want to measure:

- How many training tokens (vouchers that can be redeemed for more advanced training as learners progress through our content) are purchased quarterly? How does this impact the business bottom line?

- Does our training impact renewals with our products? If people are taking our training, we've found they are more likely to renew.

- Exam success (our most successful partners are progressing through learning paths and achieving credentials, which means they're more likely to have success when implementing our solution).

- Employee engagement (we don't draw the line between our customer and partner training, and our employee training; if we want to increase the likelihood that support tickets are resolved quickly and efficiently, our employees need to be well-trained in helping customers adjust to the services we provide).

We continually iterate on this quarterly report to bring more clarity to the exact impact our training function has on the business. With the ability to measure so many dimensions of activity, it has been possible to build a set of Business Intelligence reports that are refreshed regularly and summarized quarterly for executive review. These metrics show, in real-time, the contribution the learning operation is having on company objectives, especially as those contributions relate to:

- supporting customer go-live activities

- reducing support tickets

- enabling partners

- achieving employee performance management

Import Your Existing Data

Get a Powerful Reporting Engine + Analysis and Automated Delivery

In as little as 30 days, your training team can implement Business Intelligence reporting with QuickStart BI from Administrate.

- Import all of your existing data into Administrate's expansive database

- Begin reporting on and analyzing the metrics immediately

- Save, schedule, and deliver reports automatically to key stakeholders

❯ Get Started with Quickstart BI

Stages of BI Implementation: Where You'll Go (And How to Know When You're There)

BI Mobility:
Information→ Insight → Intelligence

One of the questions we get asked a lot at Administrate is: how will our organization know when it's time to move to the next stage of the Business Intelligence journey?

Now, this isn't a one-size-fits-all solution but we believe there are some indicators and temptations noticeable at each stage in the BI journey, and if you pay attention to them, you'll be able to identify when it's time for your team to move to the next stage, and what levers you'll need for that mobility.

Each Stage + Their Organizational Attributes

	Information	Insight	Intelligence
What is it?	Data	Reflection	Direction
What are the organizational attributes of this stage?	• Data gets collected. • You're likely using a ton of spreadsheets, and have a wishlist of spreadsheets you wish you had/wish you could relate certain spreadsheets to one another. • Your strategic impact is mostly about budget control. • You're focused on the past, and on what's happened so far.	• Data inspires imagination. • Training program conversations are likely data-based. Your team is not just relying on static reports, you're actually reflecting on your reports, and on what the data might mean. • Your training program is likely beginning to think about strategic impact, but you're not sure where to begin. • You're focused on the present, and the impact in the moment.	• Data drives innovation. • Your training program has begun discussing how your data-driven decision making is working for your training program, even in ways you might not understand, or have intended. • Your strategic impact is directly correlated to key bottom-line business objectives. • You're focused on the future, and the opportunities you have to keep impacting the business.

Temptations, Assumptions, and Stagnancy in Each Stage

What are the temptations of this stage?	Activity = Excellence	Incrementalism Awareness = Change Stopping at the Benchmark	Every problem looks like a nail to your hammer. When you reach this stage, your training program needs to remember to prioritize the right initiatives.
What are the assumptions training programs make in this stage?	Our training program is doing fine. We're reporting on the numbers we need to be reporting on.	We're responsive and improving, and we have access to insight now, which is a step up from where we were.	Our training program strategy is leading the business in making data-driven decisions.
What keeps training programs here?	If you're lacking a system of record, like a training management platform, then capturing data is difficult. Or, you might have a small team and you don't have the margin to analyze or reflect on the data.	If your EdTech stack is made up of fragmented and disconnected data sources, you might be relying on a large chunk of manual work to pull the data together, or might find it difficult to correlate data to learner records at all. Pressure to increase headcount is also usually an indication of your processes not working efficiently.	In this stage, you've likely streamlined your tech stack to ensure highly related systems with bi-directional integration that's automated. Finally, you also have the ability to easily scale as your organization grows, with cloud-based software that makes integrating with other critical systems simple.

When You Know It's Time to Move, and the Levers Creating Mobility

How do you know when you're ready to leave this stage?	• Your training operations spend too long trying to find an answer to a "how" or "why" question about your data, or you simply can't find an answer. • More training automatically = more work, making it hard to scale. • You're dealing with a maze of spreadsheets, and it's extremely frustrating and time-consuming to reflect on the meaning of your data.	• When you can rapidly iterate and answer how/why questions, you're ready to take that reflection and influence the business. • You might also start noticing potential inferences between your insights and your organization's strategic objectives. • Capacity is not an issue – strategy is not held captive by your perceived operational capacity to scale your teams' impact on the business.	• At this stage, you iterate on your reports and your initiatives, so you can maintain a consistent impact on the objectives your organization has deemed vital to success. • Where are there opportunities for continued improvement? • How can the data you're capturing continue to evolve in unique ways and become more complete?
What levers create mobility to the next stage?	Start with your EdTech infrastructure. Systems of record, like training management platforms, help to support your team in making data relatable. If your organization's strategies or priorities are changing (ex. going after a new market/ acquisition) then it's likely your training operations will play a significant role in that process. Where will investment help to solidify your impact?	Technology frees your staff up to make a higher qualitative contribution because quantifiable data is rendered more easily through a [tailored-for-training CRM](#), or an integration with your HRIS. Instead of serving the systems that make up your EdTech stack, the systems are designed to serve you with configurability, integrations, and ideally an open API.	You're now leveraging technology that's designed for agility. Your training department can lead data-driven decision making, and make training a competitive advantage for your organization.

You'll know you've arrived when the information you're exporting from your systems is attached to demonstrable ROI. From there, you can just give that insight some direction and meaning, because intelligence is just insight at work.

> **Inflection Point:** How can our training inform what is needed to move the needle instead of what is needed in response to our organization's objectives or key challenges?

JOHN'S INSIGHT

Next Steps: How to Get Going with BI

You've probably heard all of this before, right? So, how can you really get started with this process?

How To Get Started

- Take stock of your technical landscape.
- Engage with your data model.
- What problems/challenges are you trying to solve?

Take Stock of Your Technical Landscape

What is the current state of the tech stack that your training team uses, and the broader business (if applicable) uses?

> *Understanding the types of systems in place, the data they hold, and how they work together plays a key role in getting to the point where you can form a BI strategy.*

You don't have to have all of this crystalized, but you should at least know what's out there and already up and running within your organization.

Two key workflows to track:

- Which systems are most closely related to the daily operations of the business (eg, for manufacturing this might be an MRP system, for a software company, this could be a CRM).

- How does money flow into the company? Are the products sold online via an eCommerce platform, direct via a sales team, etc.?

If you have visibility into the above two key workflows, the systems involved will be the target for integration (either workflow integration, data integration, or both) with your EdTech infrastructure. This way, you'll make sure that you can relate training and learning activities against operational and revenue metrics.

Engage with Your Data Model

Now that you have a rough layout of the critical systems, figure out where (and how) data is stored. Again, this can be at a very high level:

- Customer data is stored within the CRM.

- Orders are placed through the website.

- The website is run by the eCommerce platform.

The more you can rough draft this out (ie, revenue figures by customer are stored within the CRM) the better.

What Problems/Challenges Are You Trying to Solve?

It's also helpful to approach this process from the perspective of what kinds of challenges/problems you're facing right now as a business.

Don't limit these challenges to just learner-centric problems either—make sure you're able to tie key performance indicators of the overall organization to the questions you're trying to answer.

What are the primary challenges facing your business today? Are you trying to:

- Reduce manufacturing errors?

- Reduce customer churn?

- Increase employee efficiency or reduce onboarding time?

- Grow your sales in a new market?

Training is one of the most effective ingredients within any business problem, and should be on the front lines of these challenges. As time passes, these challenges will evolve, and will require new prescriptions, new training, and more engagement. Which means your numbers, and the insights you can gather from them, will evolve over time as well.

Let the Numbers Tell the Story

Move Your Data from "photographs" to "documentaries."

Constructing a metrics-supported narrative is crucial to the long-term success of any L&D function specifically, but also to the business they support more generally. And, storytelling is one of the most impactful ways to influence audiences. This is especially true if the stories you're sharing are replete with social proof and metrics that help to color-in the narrative.

You can't just tell a story with a narrative solely-based on activity metrics, such as:

- how many learners completed a course

- the number of learners who responded satisfactorily to a survey

- how a cohort of learners' skills have been impacted, pre and post-training

Instead, focus on crafting a narrative with data (both qualitative and quantitative) that expands upon why those numbers matter.

BI supports your training program in seeing through the numbers themselves, so you can effectively communicate the direction they're moving, why they're moving, and how they represent trailing or leading indicators of your broader priorities.

For example:

- More than 100 "uncertified" learners completed the course on safety training in the manufacturing line, which was higher than last quarter.

- However, a trend was identified in the survey responses that indicated learners weren't very satisfied with the training.

- As a result, many of those target "uncertified" learners, who needed to upskill in this training, are showing no advanced skill set post-course because it's evident they weren't very engaged with the training.

While this is a simple example, the training program gathering this information now has data they can use to tell a story about this particular course, and how it might impact a greater training initiative. They also have the insight they need to dig deeper into their data and see if they can uncover meaning from anywhere else. From there, they can implement change they believe will work, and monitor that change for further iteration.

Inflection Point: What are the metrics your training team is currently using to construct your ROI narrative? Where are there opportunities for growth? Are there some data points your team can expand for more impactful information?

However, what if your training program has to grasp at incomplete data sets, access multiple systems, or leverage limited reporting tools to try and demonstrate the ROI for your training program? It becomes difficult, or nearly impossible, to write a narrative that tells the story of how your training program is contributing to larger business KPIs.

Setting Up for BI with EdTech Infrastructure

Infrastructure, originally added to English in 1887, means "the installations that form the basis for any operation or system".

And here's the key, properly running infrastructure is essentially invisible. You don't worry about whether the electricity will work, whether you can get a glass of water from the tap, or whether you can use the highway for your morning commute. You grumble when a lightbulb goes out, when the water won't get hot, or when you hit a pothole, but the infrastructure is still there.

EdTech Infrastructure should feel like physical infrastructure, critically necessary to daily life, yet seemingly invisible. It should also be intraconnected with every other key system within your EdTech environment. EdTech infrastructure acts as the foundation for the rest of your systems, and it's more commonly known, in the L&D industry, as a Training Management Platform or Training Management System.

> *The key point here is: creating an EdTech environment that hosts change is imperative. Products are great for specific issues, and often integrate well with infrastructure, but rapid agility and adaptability to your business scaling for growth is difficult. Infrastructure, on the other hand, is future-proof — it integrates with new innovation over time, and becomes greater than the sum of the individual pieces.*

But how does this all relate to BI?

What if you could integrate your HRIS with a platform that had all of your training data located in one system, and push and pull data between the two, so you could see the employees due for required training, and then notify them of that required training automatically? What if you could integrate your training data with your CRM so you could customize contact fields to your training records, and create reports based on that data? Or, what if you could integrate a single training platform with your finance tracking so you could track finances against training initiatives, and make sure your budget was aligned with the impact your training has on the business as a whole?

How much easier would it be to create an intelligent data narrative driven by the key organizational results your training team is directly impacting?

Correlating Your Data to Business Objectives

After your training program has prioritized metrics to target, you should have a pretty good idea of the business objectives your organization is focused on achieving. However, from there you need to know how your data can actually be correlated to those objectives, in practice.

This is where intraconnectivity between systems becomes paramount, and where specific training initiatives are created.

Inflection Point:

- Where are the areas in which your organization is trying to find efficiencies? Can your training program contribute to efficiency in certain departments?

- Are there opportunities for growth in your market/industry? How does your organization plan on maximizing those opportunities? How can training lead preparation for growth in new markets or verticals?

- What are some of the revenue targets your organization has in mind for the current year, and for the next 3-5 years? Can training impact that revenue, even if that impact is indirect?

- How does your organization quantify and qualify customer success? In what ways can training initiatives contribute to customer satisfaction and retention?

- Is your organization looking to implement a partner stream of revenue? How will your training operations ensure partners are well qualified to sell your products and services, and how will your metrics demonstrate that they are?

- Are compliance audits particularly important within your industry? How can your training team make producing reports on regulatory training easier and more efficient so your compliance team can simplify audits?

- Is your sales training impacting close rates (by pipeline stage) and overall pipe length?

- Who within your organization is not performing well, and could they be a candidate for additional training?

These are just a few starting questions to consider when building out your training initiatives. Work with your organization to make sure the metrics you think will contribute to success, as it relates to the organization, are aligned with their metrics of success as well.

What Business Intelligence Looks Like

For what this looks like in practice, here are some examples from John.

COVID-19 and Adaptability in the Wake of Unprecedented Times

It's not always obvious how investments into the foundation of your learning infrastructure may pay off, and in fact, the value of your investment should grow over time and help you solve new problems and challenges that were never originally contemplated.

We've seen this in particular with many customers during the COVID-19 pandemic. Complex, multinational organizations were facing challenges that were dramatic and unforeseen, and those that had a learning infrastructure, designed to embrace change, could in a matter of hours change their entire operation to respond to new constraints.

We saw this happen with TÜV SÜD in Italy as their operations were converted from classroom training to virtual instructor-led training literally overnight. Instead of being paralyzed, that team grew their offerings and made sure they could help customers by rolling out new training initiatives designed to accommodate furloughed workers upskill while confined to their homes.

CAE Health was called on to deliver a new ventilator design to the Canadian government in response to COVID-19, and their training team deployed an entirely new package of training to make sure operators were certified on the brand new equipment prior to launch.

> *These stories aren't just examples of training teams doing their job, they're examples of the learning function leading the business in the way that we believe should be the norm.*

Case Studies: How Enterprise Training Programs Use Administrate for Business Intelligence

Data Society Goes Beyond Activity Metrics

⬇ Download

ForgeRock Automated Learner Engagement

⬇ Download

Boston Whaler Reduced Employee Turnover

⬇ Download

JOHN'S CLOSING REMARKS

The Key Solution: Infrastructure Built for Scale

We've had the opportunity to speak to literally thousands of training professionals located all over the world, with a wide variety of budgets, backgrounds, and industry experience. A consistent theme is that most believe actionable Business Intelligence could, initially, transform their own operations and, eventually, impact their broader business. And yet, it's exceedingly rare to find learning teams who can access the BI they believe would help.

Our thesis, which we hinted at earlier, is that this isn't a problem of will, it's a problem of platform, or lack thereof.

> *Traditional learning products are simply not built to function within a modern business environment. They have focused for decades on enhancing, augmenting, and even replacing the traditional classroom and have never contemplated what happens outside those four walls (literal or digital).*

Unless training teams found themselves well stocked with individuals who had a technical degree, understood APIs, database design, and could evaluate, implement, and integrate traditional Business Intelligence software, they didn't have many options. Even with that background, the reality was that too much critical data was sitting "offline" in spreadsheets, thus making the entire endeavor a moot exercise.

It all seems a little bit overwhelming.

The good news is that there's hope! Increasingly, systems are arriving designed to fully support the training team's operations (and thus solve the spreadsheet problem), integrate with other systems, and ultimately house combined data sets from both the training team and the broader business. Investing in the right foundation can provide an extraordinary payoff that compounds over time, as we've witnessed during ForgeRock's meteoric growth over the last seven years.

What Will Your Organization Achieve with Business Intelligence?

What Will Your Organization Achieve with Business Intelligence?

Administrate Is a Resource for You

The importance of training has never been in question. However, historically it's been difficult to demonstrate that value in terms all levels of the organization can relate to and understand. With tools and software now being developed specifically to support training programs in analyzing their learning environments more deeply, so they can in turn lead business decisions, that history can be put in the rearview mirror.

Get QuickStart BI for Training Programs

Level Up Your Reporting. We'll Help.

In as little as 30 days, your training team can implement Business Intelligence reporting with QuickStart BI from Administrate.

- Course Viability

- Course Occupancy

- Learner Engagement

- Instructor Performance

- Account/Department Engagement

- Revenue Over Time

- Promo Code Utilization

Up to 10 Hours of Consultation, Included

Administrate's training management experts are standing by to assist your team in crafting the right reports, connecting your data to key organizational KPIs, and understanding how best to navigate the platform.

› Get Started

About Administrate

Administrate is a scalable training management platform that helps organizations streamline learning and development through our comprehensive, configurable, cloud-based software.

Explore Our Solutions

> See What's Possible

We're a Partner, Not Just a Vendor

Unlike other training software providers, we're not going to leave you to figure it out after you sign on.

Our expert teams dedicated to implementation, development, and professional services have substantial background in the training industry. They are standing by to help your organization achieve meaningful alignment and achieve real business results. That's part of the Administrate experience.

We've already helped hundreds of organizations serving millions of learners. We're ready to help you.

Schedule a consult with an Administrate expert today.

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