



ENTERPRISE L&D STRATEGY 2027

Five-Capability Implementation Playbook

**STOP BUILDING CATALOGS.
START BUILDING CAPABILITY.**

Programs are delivery options. Strategy is the system that decides where capability matters, how it will be built, and whether performance changed.

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EXECUTIVE BRIEF

The decision in one line

RECOMMENDATION

Organize enterprise L&D around five capabilities that improve business and workforce decisions. Treat programs, content and platforms as delivery options, not as the strategy.

A busy L&D function can still be strategically weak. It can launch programs on time, maintain a large catalog, achieve strong completion rates and remain disconnected from the problems leaders need solved. The real test is whether L&D can identify when capability is the constraint, direct investment toward the gaps that matter, redesign changing work, help people perform in context and show what changed.

This playbook turns that test into an operating system. It gives L&D leaders the standards, decision rules, methods, tools, governance and 12-month roadmap required to build the five capabilities in practice.

The five commercial outcomes

Capability	Commercial outcome
1. Performance diagnosis	Protects investment by distinguishing capability problems from process, tool, capacity, incentive and management problems.
2. Skills and capability intelligence	Improves build, buy, borrow, redeploy, automate and redesign decisions for critical work.
3. Human-AI workforce enablement	Converts AI adoption into safer workflows, clearer human responsibility and measurable capacity or quality gains.
4. Learning in the work	Increases transfer by designing practice, support, feedback and reinforcement around real performance.
5. Business impact measurement	Creates credible stop, improve and scale decisions while reducing reliance on activity reporting and inflated ROI claims.

What makes this different

- It begins with business value and decision quality, not an inventory of learning offerings.
- It builds all five capabilities around the same enterprise priorities so L&D operates as one system, not five disconnected workstreams.
- It uses proportional standards. Low-risk work stays light; strategic, costly or high-consequence work receives stronger diagnosis and evidence.
- It treats research as a foundation, not the product. The body focuses on decisions and execution; sources sit in the endnotes.
- It makes stop decisions legitimate. Redirecting a weak request or ending an ineffective intervention is evidence of value, not failure.

OPERATING TEST

Can L&D explain the business problem, the capability constraint, the changed work, the application design and the measured result? If one link is missing, the strategy is still a catalog with better language.

HOW TO USE THIS PLAYBOOK

A strategy document that is meant to be used

This is written for Chief Learning Officers, heads of L&D, enterprise learning leaders, talent and workforce leaders, business sponsors, transformation leads and the partners who control finance, operations, workforce data, technology and risk.

Use it in three ways

1. **Executive alignment:** use Part I to agree on the value proposition, operating model, enterprise priorities and 12-month ambition.
2. **Capability build:** use each capability chapter as a workstream charter with a promise, method, artifacts, measures and 90-day sprint.
3. **Operational execution:** use Part IV as the working toolkit for intake, diagnosis, skills mapping, human-AI workflow design, learning transfer and measurement.

The 80/20 implementation rule

START NARROW

Choose two or three enterprise priorities with measurable performance gaps, committed sponsors and access to work and data. Build all five capabilities around those priorities before expanding.

Do not launch five enterprise transformation projects at once. The capabilities become real when they change live decisions, not when each workstream publishes a framework.

Playbook map

Part	Job to be done	Primary output
I. The value case	Explain why the catalog model is insufficient and how the five capabilities create enterprise value.	Executive mandate and operating model
II. Five capability playbooks	Build each capability with a repeatable commercial standard and practical method.	Methods, artifacts, measures and sprints
III. Enterprise implementation	Sequence governance, services, people, technology and investment over 12 months.	Roadmap, scorecard and decision cadence
IV. Practitioner tools	Apply the model to live work without inventing new forms for every project.	Copy-ready canvases and checklists

PART I | THE VALUE CASE

A full catalog is not an enterprise strategy

The central problem is not that L&D lacks programs. It is that programs often become the starting point before the organization has decided what result must change, whether capability is the constraint, which work is changing, what support performance requires or how value will be judged.

THE TENSION

L&D can optimize production and still solve the wrong problems faster.

The hidden cost of a catalog-led model

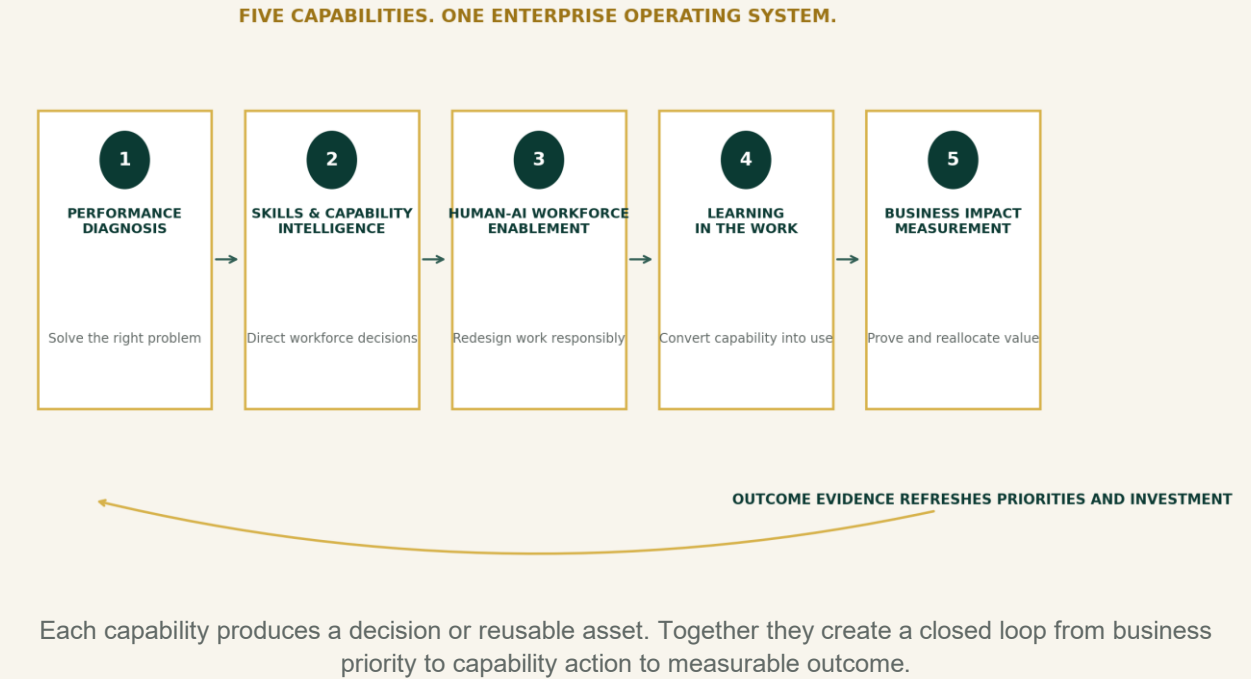
Failure	Commercial consequence
Solution-first intake	Money and attention move toward requested training before the cause is known.
Weak capability visibility	Leaders cannot distinguish critical gaps from broad wish lists or self-reported demand.
AI training without work redesign	Employees receive tool instruction while roles, controls, decisions and human accountability remain unclear.
Learning separated from work	Completion rises while application, consistency and operating performance remain uncertain.
Activity-based reporting	L&D cannot defend investment, stop weak work or redirect funding with confidence.

What the enterprise actually needs from L&D

- A reliable way to decide whether learning is part of the answer.
- A current view of the capabilities that create value, protect risk and enable strategy.
- A role in redesigning human-AI work, not simply delivering AI literacy.
- A design standard that continues through workplace application and sustained behavior.
- Evidence strong enough to make investment decisions without claiming more than the data supports.

THE OPERATING SYSTEM

Five capabilities, one value chain



The value chain in practice

Business question	Capability response	Decision produced
What result is underperforming, and why?	Performance diagnosis	Fix the environment, build capability, use a blended response or decline the request.
Which capabilities matter, where and by when?	Skills and capability intelligence	Build, buy, borrow, redeploy, automate, redesign or accept the risk.
How should work change as AI becomes more capable?	Human-AI workforce enablement	Allocate tasks, define controls, preserve human responsibility and build role-specific capability.
How will people perform under real conditions?	Learning in the work	Combine practice, support, coaching, workflow changes and formal learning around the task.
What changed, and what should we do next?	Business impact measurement	Stop, improve, scale, sustain or investigate.

THE COMMERCIAL SHIFT

What changes in the L&D operating model

Catalog-led default	Capability-led operating standard
A request begins with a course, program or content idea.	A request begins with a performance result, population, evidence and consequence.
The portfolio reflects demand, legacy offerings and stakeholder volume.	The portfolio reflects strategic materiality, capability risk, feasibility and measurable value.
Skills are inferred from titles, completions or self-report.	Priority skills are tied to critical tasks, observable proficiency and evidence confidence.
AI enablement focuses on tools and prompts.	AI enablement redesigns workflows, decision rights, controls, role capability and human-agent collaboration.
Learning ends with delivery or completion.	Design continues through application, practice, consistency, support and improvement.
Measurement reports satisfaction, hours and completions.	Measurement tests capability, transfer, operating outcomes and business contribution.

Six operating principles

1. **Performance before learning:** Approve learning only when capability is a credible constraint or a required part of a broader change.
2. **Critical work before universal coverage:** Build depth where capability affects strategy, customers, revenue, cost, capacity, safety or risk.
3. **Tasks before titles:** Analyze the work people perform, the decisions they make and the conditions that shape performance.
4. **Use before completion:** Design the moment of application, support and feedback before designing content.
5. **Evidence proportional to stakes:** Keep low-risk work light and strengthen evidence when cost, consequence or claims rise.
6. **Scale after proof:** Pilot in a bounded workflow, verify value and failure modes, then standardize what works.

The first 12-month ambition

TARGET

Reach a disciplined enterprise standard across all five capabilities and prove the integrated model on two or three priorities. Do not confuse a technology rollout or taxonomy build with operating maturity.

1. Every material request receives proportional performance screening before solution commitment.
2. Priority roles or workflows have task-linked capability profiles with visible evidence quality.
3. At least one strategically relevant human-AI workflow is redesigned and piloted with controls.
4. Strategic interventions include workplace application, authentic practice, support and manager reinforcement.
5. Outcome contracts, baselines and stop, improve or scale decisions are routine for funded strategic work.

CAPABILITY 1

Performance diagnosis

THE COMMERCIAL PROMISE

Spend only when capability is a credible constraint, and direct the organization toward the smallest effective response.

Why this earns its place in the strategy

Training requests often describe a preferred solution rather than a verified cause. Performance diagnosis converts a vague request into an evidence-based decision: what result must change, what is preventing it, whether capability is material and what mix of actions is most likely to work.

Without this capability	With this capability
Training absorbs problems caused by process, tools, capacity, incentives or management.	The primary constraint is named and owned before investment is approved.
Sponsors receive an activity but no reliable path to the operating result.	The intervention logic connects causes, actions, behaviors and measures.
L&D is accountable for outcomes it cannot control.	Non-learning actions have named owners and joint decision rights.

DECISION IMPROVED

Is capability actually limiting performance, and what is the minimum combination of changes required?

The operating standard

- No material learning investment begins with a requested solution. It begins with a qualified performance problem.
- Diagnostic depth is proportional to cost, consequence, uncertainty, regulatory exposure and scale.
- The diagnosis tests non-capability constraints before learning is approved.
- The final decision identifies owners, measures, confidence, assumptions and evidence that would change the recommendation.

Three levels keep the method proportional

Level	Use when	Time box	Evidence standard
Rapid screen	Low-cost, reversible, low-risk request with a known task and sponsor.	30-60 minutes	Qualified intake, sponsor discussion, available measure and cause screen.
Focused diagnosis	Cross-team need, moderate investment, uncertain cause or meaningful consequence.	5-10 working days	Interviews, data review and a direct view of work or artifacts.
Full diagnosis	Enterprise priority, high cost, high risk, major role change or proposed scale.	2-6 weeks	Multiple data sources, task/workflow study, cause testing, baseline and feasibility analysis.

CAPABILITY 1 | METHOD

A seven-step diagnosis that leads to a decision

1. **Frame the result:** State who must produce what result, under what conditions, by when and how it will be observed.
2. **Quantify the gap:** Define current performance, target, trend, population and consequence. Use a proxy only when its limits are explicit.
3. **Map the work:** Identify critical tasks, decisions, handoffs, tools, information and moments where performance fails.
4. **Compare performers and conditions:** Look for differences across stronger and weaker performers, teams, locations or periods.
5. **Test performance constraints:** Examine expectations, process, tools, capacity, consequences, management support, capability and readiness.
6. **Select the response:** Choose the smallest combination of changes likely to remove the primary constraint.
7. **Write the decision record:** Document evidence, confidence, recommendation, owners, measures, assumptions and stop conditions.

Performance constraint screen

Constraint	What to test	Typical response
Expectations	Are outcomes, standards, priorities and decision rights clear?	Clarify goals, roles, examples and escalation.
Process	Do steps, handoffs or approvals create failure?	Redesign workflow, ownership or sequencing.
Tools and information	Can people access accurate systems, knowledge and support at the point of need?	Improve tools, search, job aids or embedded assistance.
Capacity	Do workload, staffing, time and competing priorities permit correct performance?	Adjust capacity, scope, scheduling or service levels.
Consequences	What is rewarded, tolerated or penalized?	Align measures, incentives, recognition and consequences.
Management support	Do managers model, coach, reinforce and remove barriers?	Enable managers and establish team routines.
Knowledge and skill	Can people perform the task to standard under realistic conditions?	Instruction, practice, feedback, coaching and assessment.
Readiness	Do people see the change as useful, safe and achievable?	Involve users, build trust and use graded practice.

CAPABILITY 1 | COMMERCIALIZATION

Turn diagnosis into a visible enterprise service

Required artifacts

- Qualified performance request with sponsor, result, population, consequence and available evidence.
- Performance gap and constraint map with baseline or proxy, evidence for and against causes, and known limitations.
- Intervention logic that separates learning and non-learning actions, owners and dependencies.
- Decision record with confidence, claim boundaries and stop, improve or scale conditions.

Decision rights

Work	Accountable	Decision right
Define the business result	Business sponsor	Owns the target, operating context and access to evidence.
Conduct diagnosis	L&D performance consultant	Owns method, evidence quality and causal reasoning.
Confirm constraints	Business sponsor	Accepts the causal hypothesis and non-learning ownership.
Approve the intervention mix	Capability and Performance Council	Funds, redirects, conditions or declines strategic work.

Measures that demonstrate value

- Screening, redirect and decision cycle-time rates by service level.
- Sponsor acceptance of the diagnosis and ownership of non-learning actions.
- Avoided or redirected spend, reported only when a credible comparison exists.
- Prediction quality: whether identified constraints explain pilot results.

Failure modes to control

Failure	Control
Diagnosis becomes a gatekeeping bureaucracy.	Use proportional levels, service standards and a 48-hour qualification decision.
L&D collects opinions but not evidence from work.	Require one performance signal and one direct view of work for focused and full diagnosis.
Every case becomes a blended solution.	Name the primary constraint and remove components without a causal role.
Non-learning actions have no owner.	Do not approve the learning component until process, tool, capacity and management actions are accepted.

CAPABILITY 1 | 90-DAY BUILD SPRINT

Stand up diagnosis as a fast, trusted decision service

SPRINT OBJECTIVE
Prove that diagnosis improves decisions without turning L&D intake into a slow approval bureaucracy.

90-day build sprint

Days	Build	Exit evidence
1-30	Define service levels, intake, constraint screen, decision record and service standards. Train a small practitioner cohort using live cases.	Approved method and two requests qualified.
31-60	Complete three focused diagnoses across different functions. Review evidence quality and cycle time weekly.	Three decision records and at least one redirect or blended response.
61-90	Publish examples, establish monthly case calibration and connect decisions to portfolio governance.	Version 1 service, trained practitioners and a decision dashboard.

CAPABILITY 2

Skills and capability intelligence

THE COMMERCIAL PROMISE

Turn fragmented workforce data into better build, buy, borrow, redeploy, automate and redesign decisions.

Why this earns its place in the strategy

The enterprise does not need a perfect skills cloud. It needs decision-grade intelligence about the critical work ahead, the capability required, the evidence available and the gaps material enough to act on.

Without this capability	With this capability
Taxonomy work expands without a named business decision.	Data scope is defined by a workforce or investment decision.
Titles, self-ratings and completions create false precision.	Task-linked proficiency and multiple evidence sources show confidence and limits.
Leaders cannot see where capability risk affects strategy.	Priority gaps are ranked by criticality, urgency, exposure, scarcity and evidence confidence.

DECISION IMPROVED

Where does capability materially constrain strategy, and what workforce action should follow?

Start with a decision, not a taxonomy

Select two or three decisions the intelligence must improve, such as staffing an AI-enabled operating model, building a leadership bench, reducing a high-risk capability gap or moving employees into priority roles. The decision determines the roles, data, granularity and refresh rate required.

MINIMUM VIABLE SCOPE

Map 5-15 critical roles or workflows, 10-25 material skills per role, three to five proficiency levels and at least two evidence sources. Expand only after leaders use the data to make real decisions.

The intelligence product

Question	Decision-grade answer
What will strategy require?	Future critical work, capabilities, timing, volume and risk.
What does the work require?	Critical tasks, decisions, conditions, tools and behavior-anchored proficiency.
What do we have?	Demonstrated proficiency, adjacent skills, experience, availability and confidence.
Where does the gap matter?	Severity combined with criticality, urgency, exposure, scarcity and external supply.
What response is best?	Build, buy, borrow, redeploy, automate, redesign or accept the gap.

CAPABILITY 2 | METHOD

An eight-step method built around workforce decisions

1. **Select the business decision:** Name the decision, owner, due date and consequence. Do not begin with 'create a taxonomy.'
2. **Identify critical work:** Map tasks, decisions and outcomes that create value or risk. Separate enduring work from work likely to be automated or redesigned.
3. **Define the skill language:** Adopt or adapt external terms where useful, then write plain-language definitions connected to tasks.
4. **Anchor proficiency:** Describe increasing complexity, independence, judgment, quality and exception handling as observable performance.
5. **Estimate future demand:** Combine strategy, workflow change, technology, regulation, customer needs and workforce scenarios.
6. **Assess current supply:** Use work samples, manager evidence, operating results, credentials, experience and validated assessment. Record confidence.
7. **Prioritize the gaps:** Score criticality, urgency, gap severity, population exposure and scarcity. Adjust for evidence confidence.
8. **Make and refresh decisions:** Choose the workforce response, assign owners and refresh high-change data more frequently.

Behavior-anchored proficiency

Level	Enterprise anchor	Evidence example
0. Not required	The skill is not required for this role or decision.	No relevant task, work sample or validated evidence.
1. Supported	Performs defined, lower-complexity tasks with guidance.	Guided simulation, supervised work or validated completion plus observation.
2. Independent	Performs routine tasks to standard without direct guidance.	Work output, quality data, manager calibration or assessment.
3. Advanced	Handles complex or ambiguous work, adapts methods and supports others.	Complex work sample, exception handling, peer review or sustained outcomes.
4. System-shaping	Defines standards, designs approaches and improves enterprise performance.	Enterprise artifacts, innovation, governance contribution or measurable system impact.

CAPABILITY 2 | COMMERCIALIZATION

Make the data useful before making it broad

Capability Gap Priority Score

Use a transparent ranking method to focus discussion. It is an operating recommendation, not a universal formula. Score each factor from 1 to 5, apply local weights, multiply by evidence confidence and use the result to trigger better evidence, not automatic funding.

Factor	Illustrative weight	Decision question
Business criticality	30%	How directly does the capability affect strategy, customers, revenue, cost, capacity or mission?
Urgency	20%	How soon will the gap constrain the organization?
Gap severity	20%	How far is current demonstrated proficiency from the required level?
Population exposure	15%	How much of the workforce or workflow is affected?
External scarcity	15%	How difficult, slow or expensive is it to acquire the capability externally?

DECISION RULE

A high score with weak evidence should trigger better evidence, not automatic investment.

Governance and ethics

- Define which decisions may use skill data and which may not. Developmental profiles should not silently become selection or performance-management data.
- Give employees visibility into material data, evidence sources, uncertainty and correction routes where policy and law require or permit.
- Test assessment and algorithmic inference for adverse impact, accessibility and context bias before consequential use.
- Assign stewards and retirement rules. A taxonomy without ownership becomes a growing list of stale synonyms.

Measures that demonstrate value

- Coverage of critical roles and workflows with approved task and skill profiles.
- Percentage of priority records with behavior anchors, steward, source, confidence and refresh date.
- Time required to answer agreed workforce decisions before and after implementation.
- Internal fill, redeployment or pathway conversion for priority roles, using an appropriate comparison.
- Gap closure on demonstrated proficiency and related operating outcomes.

90-day build sprint

Days	Build	Exit evidence
1-30	Choose two workforce decisions and 5-15 critical roles or workflows. Define skill, proficiency and evidence standards.	Named decisions and owners, approved data model and scoped boundary.
31-60	Map critical work with business experts, build validated profiles and assess a sample using at least two evidence sources.	Validated profiles, sample supply view and confidence findings.
61-90	Prioritize gaps, make build, buy, borrow, redeploy, automate or redesign decisions and test the refresh cadence.	Decision record, funded actions, owners and lessons log.

CAPABILITY 3

Human-AI workforce enablement

THE COMMERCIAL PROMISE

Convert AI adoption into redesigned work, responsible human-agent collaboration and role-specific capability.

Why this earns its place in the strategy

Generic AI literacy is necessary, but it is not the transformation. Value appears when teams redesign workflows, allocate work deliberately, define control points, preserve human responsibility and build the capability required to operate the new system.

Without this capability	With this capability
AI training teaches tools without changing the work.	Enablement is tied to a workflow, role, operating target and approved use.
Productivity claims rely on usage or self-report.	Value is tested through cycle time, capacity, quality, cost, risk and workforce evidence.
A human remains nominally accountable but cannot challenge the system.	Oversight requires competence, authority, time, practice, controls and escalation.

DECISION IMPROVED

Which tasks should remain human, become AI-assisted, require human approval or operate within controlled automation?

Four outcomes define success

Outcome	What good looks like	Evidence
Fluency	People understand relevant AI capabilities, limitations, privacy, risk and when to seek help.	Scenario assessment, safe-use decisions and escalation behavior.
Task capability	People can use approved AI for defined work and verify outputs to standard.	Scored work sample, quality, error, rework and time.
Workflow adoption	Teams use a redesigned workflow consistently with clear roles and controls.	Workflow telemetry, observation, cycle time and adherence.
Responsible value	The workflow creates measurable benefit without unacceptable risk or workforce harm.	Operating outcome, incidents, overrides, user impact and audit evidence.

Do not begin with an AI curriculum

Begin with a portfolio of work. Select workflows where value, feasibility, data access, controls and workforce readiness justify exploration. Use literacy as a foundation, then build role- and workflow-specific capability.

Layer	Audience	Purpose
Foundation	All affected employees and managers	Approved uses, limitations, data handling, verification, escalation and workforce implications.
Role application	People using AI in defined tasks	Task methods, context, output evaluation, documentation, exception handling and quality standards.
Workflow leadership	Managers, product owners and process owners	Work redesign, decision rights, adoption, controls, worker involvement and continuous improvement.
Build and oversight	Developers, configurators, risk owners and auditors	Lifecycle responsibility, testing, monitoring, human oversight, incident response and evidence.

CAPABILITY 3 | METHOD

Redesign the workflow before designing the learning

1. **Define the outcome and boundary:** Name the customer or operating result, workflow start and end, affected population, baseline, constraints and prohibited uses.
2. **Map tasks and decisions:** Break the workflow into tasks, information, decisions, handoffs, outputs, exceptions and controls. Observe actual work.
3. **Assess AI fit:** Evaluate value, feasibility, data sensitivity, error consequence, explainability, reversibility and downstream impact.
4. **Allocate work:** Decide whether each task remains human-only, becomes AI-assisted, is AI-generated with human approval or is controlled automation.
5. **Design control points:** Specify approvals, verification, traceability, access, data boundaries, fallback, escalation, monitoring and incident response.
6. **Define new capability:** Identify what users, managers, owners and overseers must know and do, including domain judgment and challenge capability.
7. **Run a controlled pilot:** Use representative tasks, baseline measures, defined users, support, logging and pre-agreed stop conditions.
8. **Stabilize and scale:** Correct workflow defects, update roles and standards, embed support, monitor drift and refresh capability as systems change.

Work-allocation decision model

Pattern	Use when	Human responsibility
Human-only	Law, ethics, trust, empathy, accountability or error consequence requires direct human action.	Perform and document the work; AI may support.
AI-assisted	AI can retrieve, summarize, analyze, suggest or structure while the human remains the primary performer.	Set purpose, provide context, verify and decide.
AI-generated, human-approved	AI can produce a draft or recommendation, but quality or consequence requires explicit approval.	Review criteria, correct, approve, record and escalate exceptions.
Controlled automation	The task is stable, measurable, bounded, monitored and reversible with acceptable residual risk.	Design rules, monitor exceptions and performance, intervene and improve.

CRITICAL DISTINCTION

Human-in-the-loop is not a control unless the person has the time, information, authority, competence and usable way to challenge or override the system.

CAPABILITY 3 | HUMAN-AGENT STANDARD

Build disciplined collaboration, not prompt dependency

As AI systems become more agentic, employees need a repeatable way to delegate, constrain, observe and verify multi-step work. The standard below applies across approved agents and tools.

Stage	Required practice	Evidence
Brief	Define outcome, audience, quality criteria, scope, authority, deadline and what the agent must not do.	Task brief or reusable instruction.
Context	Provide only authorized information, tools, sources, examples and current policy required for the task.	Approved access and context record.
Plan	Require the agent to expose material assumptions, dependencies, intended actions and approval points when stakes warrant.	Reviewable plan and human approval.
Execute	Limit actions to authorized tools, data, destinations and transaction thresholds. Preserve provenance where required.	Action log, provenance and status.
Verify	Check facts, calculations, sources, policy, tone, completeness, bias and downstream effects using defined criteria.	Review checklist, test or second-person approval.
Escalate	Stop when confidence is low, an exception occurs, sensitive data is encountered or authority is unclear.	Escalation route and incident record.
Learn	Capture failures, corrections and reusable patterns without feeding protected information into unauthorized systems.	Updated workflow, examples, controls and learning assets.

Measures that demonstrate value

Category	Examples	Decision question
Capability	Scenario judgment, task work sample, verification accuracy and escalation decisions.	Can people perform the redesigned work safely?
Adoption	Eligible users, active use, workflow adherence, feature use and support demand.	Is the new workflow being used as intended?
Performance	Cycle time, throughput, quality, error, rework, customer outcome, innovation or capacity.	Did work improve relative to baseline or comparison?
Risk	Unsafe prompts, sensitive-data events, hallucination escapes, overrides, near misses, complaints and audit findings.	Are controls working and residual risks acceptable?
Workforce	Role clarity, workload, confidence, skill change, inclusion and retained domain expertise.	Is the change sustainable and fairly supported?

Failure modes to control

Failure	Control
AI fluency becomes one generic course for everyone.	Use a common foundation plus role, workflow and risk-specific pathways.
Adoption is equated with value.	Track workflow performance, converted capacity, cost and risk in addition to use.
Human review is ceremonial.	Define criteria, time, authority, competence, logging and override routes.
Employees learn after work decisions are made.	Involve affected users in task mapping, risk discovery, pilot design and improvement.
The tool changes faster than the program.	Use modular assets, governed knowledge, change triggers and workflow-level refresh ownership.

CAPABILITY 3 | 90-DAY BUILD SPRINT

Prove one redesigned workflow before expanding AI enablement

SPRINT OBJECTIVE

Use a bounded workflow to test value, human responsibility, controls, role capability and workforce effects together.

90-day build sprint

Days	Build	Exit evidence
1-30	Establish governance, risk tiers and use-case criteria. Select one bounded workflow and capture the baseline.	Approved scope, owners, workflow canvas and baseline.
31-60	Co-design the future workflow, controls and task capability. Build work-based enablement prototypes.	Approved work allocation, controls and validated practice tasks.
61-90	Run a controlled pilot, monitor performance and risk, correct defects and make a stop, improve or scale decision.	Pilot evidence pack, decision record and reusable implementation assets.

CAPABILITY 4

Learning in the work

THE COMMERCIAL PROMISE

Convert learning investment into real application, reliable behavior and operating performance.

Why this earns its place in the strategy

Learning creates value only when people can use it under real work conditions. The design therefore extends beyond formal learning to first application, repeated practice, manager support, workflow cues, performance support, feedback and environmental changes.

Without this capability	With this capability
The learning event carries most of the design effort.	The performance journey from preparation through sustained use is designed as one system.
Application is left to motivation or manager goodwill.	First use, practice, support, feedback and reinforcement have named owners.
Completion is mistaken for transfer.	The evidence chain follows capability into real work and operating outcomes.

DECISION IMPROVED

What must happen before, during and after learning so the capability is used reliably in real work?

Start at the business outcome and work backward

The attached Learning-to-Performance Planning Job Aid provides the core planning chain. Start with stages 7 and 6, define the business outcome and performance shift, then work backward through behavior, consistency, practice, workplace application and learning.

Stage	Planning question	Evidence
1. Learning	What capability must people build and demonstrate in the learning environment?	Knowledge, skill, judgment and controlled application.
2. Workplace application	Where, when and in what real work situation will people first use it?	A deliberate first real-world application.
3. Practice	How will people repeat the skill across varied situations with feedback?	Attempts, feedback, correction and increasing difficulty.
4. Consistency	What support, cues and system conditions will make the behavior reliable?	Repeated use under normal workload and pressure.
5. Behavior change	What observable behavior should become routine?	The new behavior replaces the old pattern.
6. Performance	Which performance indicator should move, and what baseline or comparison will be used?	A defined operating measure or credible proxy.
7. Business outcome	Which organizational result should improved performance contribute to?	A clear contribution hypothesis with other factors acknowledged.

DESIGN GAP RULE

If you cannot answer one of the seven stages, treat it as a design gap, not a measurement problem.

CAPABILITY 4 | METHOD

Design the performance journey, not only the event

Stage	Design question	Minimum component
Prepare	What must the person understand before useful or safe action?	Purpose, standards, mental model, examples, prerequisites and manager context.
Practice	What must the person try, decide, produce and correct before independent work?	Representative tasks, criteria, feedback, variability and safe failure.
Perform	What support and authority are available at the point of work?	Job aid, contextual assistance, expert escalation, workflow access and protected opportunity.
Reinforce	What will prompt repetition, feedback and accountability after first use?	Manager routine, peer review, spaced retrieval, cues and performance discussion.
Improve	How will evidence from use update the workflow, support and learning assets?	Outcome review, user feedback, failure patterns, content ownership and change control.

Nine-step design method

1. **Define target performance:** State the behavior, output, quality, conditions, frequency and consequence. Connect it to an operating measure.
2. **Decompose critical tasks and decisions:** Identify where people must recall, recognize, decide, communicate, create, operate, troubleshoot or escalate.
3. **Choose remember, find or practice:** Decide what must be available from memory, what can be found during work and what requires repeated realistic practice.
4. **Design authentic practice:** Use the same decisions, information, tools, ambiguity, time pressure, exceptions and quality criteria found in work.
5. **Build feedback:** Provide timely, specific information about the gap between performance and standard, followed by another attempt where feasible.
6. **Embed performance support:** Place concise, governed assistance in the workflow and reduce search or translation effort at the moment of need.
7. **Enable the manager and team:** Define how managers set expectations, create opportunity, observe, coach, remove barriers and recognize correct performance.
8. **Plan spaced application:** Sequence repeated use, retrieval and reflection over time. Avoid concentrating all practice in one event.
9. **Measure and refresh:** Use behavior and operating evidence to stop, revise or scale. Update assets when work, tools, policy or failure patterns change.

CAPABILITY 4 | ENABLEMENT ARCHITECTURE

Put the right support around the task

Five delivery modes

Mode	Best use	Examples
Performance support	The answer or procedure can be safely accessed during work.	Checklist, decision tree, template, searchable knowledge, embedded guidance or approved assistant.
Guided practice	Performance requires judgment, fluent execution or safe handling of variation and error.	Simulation, scenario, role practice, sandbox, work sample and coached rehearsal.
Coaching and feedback	Performance improves through observation, reflection, correction and accountability over time.	Manager coaching, expert review, peer feedback, office hours and case review.
Social and experiential learning	Tacit knowledge, local context and problem solving are distributed across the workforce.	Peer circles, communities, stretch work, rotations, shadowing and after-action review.
Formal learning	A common mental model, protected practice, certification or structured progression is required.	Workshop, pathway, cohort, digital module, lab or accredited program.

Manager reinforcement contract

For material interventions, the sponsor and participating managers should agree to the following before launch. If the work environment cannot support application, redesign, delay or label the intervention as awareness rather than performance enablement.

- Set the target behavior and explain why it matters.
- Provide an assignment or opportunity to apply within a defined period.
- Observe or review at least one real work output where feasible.
- Use agreed feedback criteria and remove local barriers.
- Escalate process, tool, policy or capacity constraints that learning cannot fix.
- Participate in the outcome review and decide whether to continue, improve or stop.

Measures that demonstrate value

- Time from learning or release to first supported workplace application.
- Percentage of participants receiving a relevant application opportunity and feedback.
- Performance-support success: task resolution, search success, accuracy and escalation.
- Observed or sampled target behavior under real conditions.
- Practice progression: attempts, feedback, correction and independent standard achieved.
- Operating outcomes and unintended effects after application.

90-day build sprint

Days	Build	Exit evidence
1-30	Define the learning-in-the-work standard and redesign one existing priority around the seven-stage performance chain.	Target performance, task analysis and current transfer gaps.
31-60	Build authentic practice, one in-work support asset and a manager reinforcement routine. Test with representative users.	Usability, practice evidence and approved support ownership.
61-90	Run the redesigned journey, measure application and operating signals and publish reusable patterns.	Transfer evidence, improvement decisions and design pattern library.

CAPABILITY 5

Business impact measurement

THE COMMERCIAL PROMISE

Make better investment decisions with evidence while keeping every claim inside what the design can support.

Why this earns its place in the strategy

Measurement begins before design, when the business problem, target behavior, baseline, operating measure, cost and decision rule are still available. The purpose is not to prove that every program worked. It is to create credible stop, improve, scale and sustain decisions.

Without this capability	With this capability
Evaluation starts after launch, when baselines and data access are gone.	Outcome contracts, data owners and evaluation conditions are agreed before approval.
Completions and satisfaction stand in for impact.	Evidence follows the chain from capability through transfer, performance and business contribution.
ROI is treated as a universal answer.	Financial analysis is used only when benefits can be credibly converted and assumptions are transparent.

DECISION IMPROVED

What changed, how confident are we, what contribution can we defend, and should we stop, improve, scale or sustain?

The outcome chain

Link	Definition	Example
Business outcome	Enterprise result the sponsor ultimately cares about.	Reduce avoidable customer churn.
Operating measure	Nearer performance indicator the target population can influence.	Increase first-contact resolution and reduce repeat contacts.
Critical behavior	Observable action or decision expected to change the operating measure.	Diagnose the issue, select the correct resolution and confirm understanding.
Capability	Knowledge, skill, judgment and enabling conditions required for the behavior.	Product diagnosis, exception judgment, conversation skill and system access.
Intervention	Learning and non-learning actions intended to build capability and remove constraints.	Scenario practice, decision support, coaching and revised escalation.
Evidence	Leading, transfer, operating, business, financial and risk measures used to test the chain.	Work sample, behavior observation, repeat contact, churn and cost.

TRUTH RULE

Use language that matches the design: participants reported, performance improved after, the intervention likely contributed, or the estimated effect was. Do not imply causal proof when the evaluation cannot support it.

CAPABILITY 5 | METHOD

Design measurement as part of the investment decision

1. **Identify the decision user:** Clarify who will use the evidence, what decision they will make and when. Measurement without a decision becomes reporting overhead.
2. **Define measures and targets:** Specify population, denominator, source, owner, refresh rate, target, threshold and known limits.
3. **Capture baseline and trend:** Use enough pre-period data to understand normal variation, seasonality and existing direction. Record concurrent changes.
4. **Select the comparison:** Use a credible untreated or later-treated group, matched unit, historical target or other counterfactual when stakes justify it.
5. **Collect leading and transfer evidence:** Test whether people developed capability, applied the behavior and had the conditions to perform.
6. **Collect outcome and risk evidence:** Track operating and business measures, cost, quality, incidents, unintended effects and population differences.
7. **Analyze contribution:** Test alternative explanations, implementation strength, dose, timing and whether the observed pattern matches the outcome chain.
8. **Make the portfolio decision:** Apply pre-agreed thresholds to stop, improve, scale, sustain or gather more evidence. Reuse the insight.

Three measurement tiers

Tier	Use when	Minimum design	Permitted claim
1. Delivery and readiness	Low-cost, low-risk, compliance, awareness or early prototype.	Reach, relevant completion, access, usability, readiness and basic application signal.	Delivered, understood or ready. Do not claim business impact.
2. Performance contribution	Material workflow or capability intervention with accessible operating measures.	Baseline, target behavior, repeated operating measure and comparison when feasible.	Contributed to improvement, with limits stated.
3. Strategic impact	High-cost, high-risk or scale decision where stronger causal or financial confidence matters.	Strong comparison, phased rollout, matched group, interrupted time series or experiment; full cost and sensitivity analysis.	Estimated causal and financial impact within the design's limits.

CAPABILITY 5 | COMMERCIALIZATION

Use balanced evidence and explicit decision thresholds

Balanced measurement set

Measure type	Question	Examples
Reach and access	Did the intended population have a fair opportunity to participate or use support?	Eligibility, participation, access, accommodation and segment differences.
Experience and usability	Could users understand and use the intervention?	Usability tasks, support demand, relevance and friction.
Capability	Can people perform the required task or decision?	Work sample, simulation, assessment, calibration and confidence.
Transfer	Did target behavior occur in real work under expected conditions?	Observation, artifact review, system signal, manager evidence and support use.
Operating	Did work performance change?	Quality, error, rework, cycle time, throughput, customer, safety and compliance.
Business	Did the operating change contribute to enterprise value or risk?	Revenue, retention, cost, capacity, loss, incident, mission or strategic milestone.
Financial	Was verified value worth total cost?	Net benefit, ROI, payback, cost per successful performer and cost avoidance.
Risk and unintended effects	What worsened, shifted or affected groups differently?	Incidents, workarounds, workload, inequity, deskilling and audit findings.

Financial methods

Method	Formula	Decision use
Total cost	Design + delivery + participant time + manager time + technology + support + measurement + ongoing cost	Compare options and calculate net value.
Gross benefit	Verified incremental revenue, capacity value, avoided cost or loss reduction attributable within the evidence limits	Set the benefit before intervention cost.
Net benefit	Gross benefit - total cost	Determine absolute value created.
ROI	$(\text{Gross benefit} - \text{total cost}) / \text{total cost} \times 100\%$	Compare return when inputs are comparable and credible.
Payback	Total cost / periodic net benefit	Estimate time to recover investment.
Cost per successful performer	Total cost / number demonstrating sustained target performance	Compare delivery models without forcing monetization.

FINANCIAL CONTROL

Track the full cost of strategic interventions, including participant and manager time, technology, support, data, change and measurement. Course-production cost alone understates investment and distorts comparisons.

Decision thresholds

Decision	Illustrative threshold
Stop	No credible capability or performance improvement, unacceptable risk or the underlying work need no longer exists.
Improve	Capability improved but transfer or operating performance did not; implementation was weak; or a specific constraint remains.

Decision	Illustrative threshold
Scale	Target behavior and operating result moved beyond pre-agreed thresholds, risk is acceptable and the mechanism appears repeatable.
Sustain	The capability remains needed and the intervention is efficient, current and owned.
Investigate	Evidence conflicts, the sample is weak, confidence is low or an external change plausibly explains the result.

90-day build sprint

Days	Build	Exit evidence
1-30	Define measurement tiers, outcome contract, metric dictionary and claim language. Select one priority and capture the baseline.	Approved standards, owners, decision users and evaluation plan.
31-60	Collect leading, transfer and operating evidence. Build a decision-focused review rather than a dashboard-first product.	Interim evidence, data-quality findings and corrected implementation issues.
61-90	Complete the first stop, improve, scale or sustain review, validate cost assumptions and publish the case with limitations.	Decision record, reusable example and quarterly evidence cadence.

PART III | ENTERPRISE IMPLEMENTATION

Build the system through live business priorities

ONE RECOMMENDATION

Use two or three enterprise priorities as the proving ground for all five capabilities. Build the methods together, demonstrate value, then expand. Do not run five disconnected transformation programs.

The roadmap is intentionally relative so an organization can begin in any month. Each phase strengthens standards, produces evidence and increases the operating reach of the model.

12-month roadmap

Phase	Objective	Major actions	Decision gate
Months 1-3: Focus and foundation	Set the mandate, choose priorities and establish minimum standards.	Name sponsor and lead; select two or three priorities; assess maturity; establish governance; define five minimum standards; confirm baselines, data owners and practitioner cohort.	Proceed only if sponsors own outcomes, measures and non-learning actions.
Months 4-6: Prove	Run integrated pilots and prove method, data and workflow defects.	Complete diagnosis; map critical work and skills; redesign AI workflow where relevant; build authentic practice and support; sign outcome contracts; launch pilots with stop conditions.	Continue only if pilots show fit-for-purpose evidence and usable operating standards.
Months 7-9: Integrate	Connect shared data, governance, services and portfolio routines.	Record pilot decisions; standardize proven methods; calibrate practitioners; connect skill, learning and outcome records; launch service catalog; retire obsolete processes; complete portfolio review.	Scale only methods that have evidence, ownership and manageable burden.
Months 10-12: Scale	Make the system the normal way strategic L&D work is commissioned and governed.	Onboard additional priorities; operate executive scorecard; refresh capability and skill data; retire low-value offerings and assets; confirm year-two investment, maturity target and owners.	Approve expansion only where demand, evidence, capacity and controls are credible.

Month-12 outcomes

- A single enterprise intake and qualification standard is used for material L&D demand.
- Two or three priorities have moved through all five capabilities and produced stop, improve or scale decisions.
- Critical roles or workflows have task-linked, behavior-anchored capability profiles and visible evidence confidence.
- At least one strategically relevant AI-enabled workflow has been redesigned and piloted with controls and role capability.
- Strategic interventions include authentic practice, in-work support, manager reinforcement and outcome contracts as routine standards.
- The council has recorded at least one stop, one improve and one scale decision, where evidence supports them.

GOVERNANCE

Govern capability investment, not individual courses

Create a Capability and Performance Council rather than a learning steering committee. Its job is to prioritize enterprise performance and capability risks, resolve cross-functional dependencies and make investment decisions.

Council charter

Field	Decision or entry
Purpose	Direct enterprise capability investment toward material performance and workforce outcomes.
Authority	Prioritize, fund, redirect, condition, stop, scale and resolve cross-functional dependencies within delegated limits.
Membership	Executive sponsor, CLO or L&D leader, business sponsors, HR/talent/workforce, finance, technology/data and privacy/risk/security.
Monthly decision	Which priorities advance, pause, redirect or stop? Which dependencies need executive action?
Quarterly decision	Which capabilities, roles and workflows remain strategically material? How should investment change?
Evidence pack	Problem, diagnosis confidence, capability gap, intervention logic, baseline, cost, risk and outcome evidence.

Portfolio decision gates

Gate	Decision question	Minimum evidence	Possible decision
1. Qualify	Is this a material performance or capability need?	Business owner, affected population, consequence and initial measure.	Decline, route or diagnose.
2. Diagnose	Is capability a credible constraint?	Triangulated evidence and tested alternatives.	Non-learning fix, blended response, learning or no response.
3. Design	Will the proposed solution change target behavior in context?	Outcome chain, practice plan, support plan, owners and risks.	Revise, pilot or cancel.
4. Pilot	Did performance improve enough to justify scale?	Baseline, comparison or trend, adoption, transfer, operating outcome and risk data.	Stop, improve or scale.
5. Sustain	Is the capability still needed and the intervention efficient?	Outcome trend, content validity, usage, cost and role/workflow change.	Retire, refresh or continue.

Operating cadences

Cadence	Participants	Decisions
Weekly delivery review	Capability workstream leads and project teams	Blockers, evidence gaps, method issues, risk, user feedback and next actions.
Monthly council	Executive sponsor, CLO/L&D, business, finance, technology/data, talent and risk	Qualify priorities, fund pilots, resolve dependencies and make stop, improve or scale decisions.
Quarterly portfolio review	Council plus rotating capability owners and workforce leaders	Refresh priorities, reallocate capacity, retire offerings and approve scale.
Semiannual workforce review	Executive team, HR/talent, workforce planning and business leaders	Update critical roles, scenarios, build/buy/borrow/automate decisions and investment.

OPERATING MODEL

Build a small enterprise team with a federated network

The exact staffing depends on enterprise size, portfolio and existing roles. The non-negotiable requirement is named accountability and protected capacity, not new titles.

Role	Primary accountability	Critical capability
Executive sponsor	Mandate, cross-functional authority, funding and barrier removal.	Enterprise influence and outcome ownership.
L&D transformation lead	Integrated roadmap, governance, operating model, portfolio and adoption.	Strategy, operating design and execution discipline.
Performance consulting lead	Diagnosis standards, practitioner calibration and intervention decisions.	Systems analysis, discovery, consulting and causal reasoning.
Skills intelligence owner	Skill language, data model, use cases, stewardship and decision products.	Work/task analysis, data product management and workforce planning.
Human-AI workforce lead	Workflow enablement, role pathways and human-agent operating practices.	Work redesign, AI fluency, change, risk and adoption.
Learning/performance architect	Practice, performance support, coaching and learning-in-work patterns.	Instructional design, performance support and transfer.
Measurement and insights lead	Outcome contracts, evaluation designs, analytics and evidence reviews.	Measurement, analytics, research design and business acumen.
Data and technology partner	Data access, integration, platforms, security and technical feasibility.	Architecture, analytics, privacy and product delivery.
Federated business partners	Local diagnosis, context, manager adoption and operating evidence.	Business knowledge, facilitation, change and feedback.

Decision services, not a product catalog

Service	Client receives	Service-level principle
Performance qualification	A rapid decision to decline, route or diagnose a request.	Acknowledge quickly; decide the diagnostic level within two working days where feasible.
Focused diagnosis	Performance gap, constraint map and intervention recommendation.	Time-boxed around stakes; sponsor provides data and access.
Capability intelligence	Priority role/workflow profile, gap view and workforce action options.	Scope to a named decision and refresh owner.
Human-AI workflow enablement	Redesigned workflow, capability, controls and pilot evidence.	Joint delivery with business, technology and risk owners.
Learning-in-work architecture	Performance journey, practice, support and reinforcement design.	Business commits application conditions and ownership.
Impact and evidence	Outcome contract, measurement plan and stop, improve or scale review.	Evidence strength matches stakes and claim.

PORTFOLIO DISCIPLINE

Admit only work that can produce a useful decision

PORTFOLIO RULE

If a request cannot name a material gap, accountable sponsor, feasible path and evidence source, route it to a rapid screen, hold it for evidence or decline it.

Demand and portfolio criteria

Criterion	Question	Evidence
Strategic materiality	Does the need affect a named strategic, customer, mission, financial or risk priority?	Strategy, operating plan, risk register or executive commitment.
Performance gap	Is there a defined current-to-target gap with consequence?	Operating measure, trend or credible proxy.
Capability relevance	Is capability a plausible material constraint?	Diagnostic evidence for and against.
Feasibility	Can work, environment and data support an intervention and measurement?	Sponsor commitment, access, dependencies and readiness.
Value and urgency	Is the likely value, avoided risk or time sensitivity worth the investment?	Business estimate, cost, deadline and options.
Scalability or learning value	Will the work produce reusable evidence, capability or assets?	Common workflow, population and learning agenda.

INVESTMENT, TECHNOLOGY AND ADOPTION

Fund the operating system, not disconnected tools

Investment model

Do not set a universal budget percentage for each capability. Cost structures differ by enterprise, regulation, maturity and existing technology. Use a portfolio model that exposes full cost and evidence quality.

Funding bucket	Purpose	Decision rule
Run and comply	Maintain required operations, mandatory learning, platform commitments and critical certifications.	Fund to the required standard; remove duplication and verify readiness or compliance appropriately.
Transform	Address strategic performance, capability and human-AI priorities through the full five-capability system.	Fund against outcome contracts, staged gates and scaled evidence.
Build infrastructure	Create methods, data, practitioner capability, governance and reusable assets.	Fund only infrastructure tied to defined decisions and adoption milestones.
Experiment	Test uncertain methods, technology and new workflow patterns in bounded pilots.	Use small bets, stop conditions and explicit learning questions.

Technology principles

- Prove the operating model before buying a platform to compensate for unclear methods or ownership.
- Use a modular architecture across systems of record, skill and role data, workflow tools, learning delivery, experience, analytics and AI agents.
- Design interoperability around stable identifiers, definitions and records rather than vendor-specific labels.
- Keep an authoritative source for policy, procedure and critical knowledge. AI retrieval does not fix ungoverned content.
- Use event and outcome data that answer named decisions. More telemetry is not automatically better.
- Apply privacy, accessibility, security, records, procurement and AI-risk controls from design through retirement.
- Require export, versioning and migration paths for capability data and critical learning assets.

Change and adoption strategy

- Co-design standards with business partners and use live cases to build credibility.
- Explain what becomes easier: clearer decisions, fewer unnecessary requests, better support and stronger evidence.
- Keep gates proportional and publish rapid-screen examples so leaders know when analysis will remain light.
- Build practitioner capability through supervised cases, calibration and evidence review, not tool training alone.
- Show stop and redirect decisions as value protection while holding L&D accountable for speed and practicality.
- Retire old intake forms, dashboards and governance routines when the replacement is ready. Parallel systems sustain old behavior.

EXECUTIVE CONTROL

Run one scorecard and one enterprise risk register

Executive scorecard

Capability	Leading indicator	Outcome indicator	Risk indicator
Performance diagnosis	% material demand screened; diagnostic cycle time.	% decisions redirected, piloted or stopped with sponsor ownership.	High-stakes work approved without adequate diagnosis.
Skills intelligence	Critical roles/workflows mapped; evidence confidence and recency.	Priority gaps closed; workforce decisions improved; internal movement where relevant.	Bias, stale data, unauthorized or opaque use.
Human-AI enablement	Role capability achieved; pilots with approved workflow and controls.	Quality, cycle time, capacity, customer or innovation benefit.	Incidents, over-reliance, inequity, deskilling or control failure.
Learning in the work	Application opportunity, authentic practice, support and manager reinforcement.	Observed behavior and operating performance.	Stale support, blocked application or excessive burden.
Impact measurement	% strategic work with outcome contract and baseline.	Stop, improve or scale decisions; verified net value where appropriate.	Overclaiming, weak comparisons, missing cost or measurement burden.

Enterprise risks

Risk	Early signal	Mitigation
Bureaucracy	Long queues, bypass behavior and sponsor frustration.	Proportional diagnostics, service levels, local authority and rapid qualification.
Scope overload	Many taxonomies, pilots and tools; few completed decisions.	Limit first-year priorities and publish explicit boundaries.
Weak business ownership	L&D owns measures and non-learning actions.	Require sponsor outcome contract and gate funding on ownership.
Data false precision	Dashboards hide inference, recency and missingness.	Show source, confidence, limitations and correction routes.
AI harm or distrust	Unsafe workarounds, under-reporting and employee resistance.	Worker involvement, risk-tiered controls, incident safety and transparent use.
Low transfer	Completion is high but application and behavior are low.	Re-architect for real work, manager commitment and environmental fixes.
Impact overclaiming	ROI or causal language exceeds the evaluation design.	Measurement tiers, finance validation and claim review.
Capability fragility	Methods depend on one expert or vendor.	Cohort capability, playbooks, case calibration and documented stewardship.

Immediate next three actions

1. Name one executive sponsor and one L&D transformation owner with authority to align demand, data, technology, risk and business partners.
2. Select two or three priorities with measurable performance gaps, willing sponsors and access to work and data.
3. Run the rapid maturity assessment in Appendix A, then approve the Months 1-3 standards, pilot charter and practitioner capacity.

PART IV | PRACTITIONER TOOLS

Use these as decision records, not administrative forms

Remove fields that do not affect a decision and add fields required by the organization's sector, policy, collective agreements, jurisdictions or risk profile. The objective is consistent reasoning, not more paperwork.

Appendix A. Rapid maturity assessment

Score each statement from 0 to 3 using current evidence: 0 = absent; 1 = occasional or person-dependent; 2 = defined and consistently used on material work; 3 = integrated into enterprise decisions and continuously improved.

Capability	Assessment statement	Score 0-3	Evidence / action
Performance diagnosis	Material requests begin with a performance problem, measure and sponsor rather than a requested solution.		
Performance diagnosis	Diagnostic depth is proportional to cost, risk and consequence.		
Performance diagnosis	Evidence tests non-capability constraints before learning is approved.		
Skills intelligence	Critical roles and workflows are linked to tasks and defined skills.		
Skills intelligence	Proficiency levels use observable behavior and evidence standards.		
Skills intelligence	Priority gaps influence workforce and investment decisions.		
Human-AI enablement	AI priorities begin with workflow and outcome analysis, not generic tool training.		
Human-AI enablement	Tasks have explicit human-AI allocation, decision rights and controls.		
Human-AI enablement	Users, managers, owners and overseers receive role-specific enablement.		
Learning in the work	Design begins with target performance and workplace application conditions.		
Learning in the work	Critical tasks receive authentic practice, feedback and in-work support.		
Learning in the work	Managers commit application opportunity, coaching and barrier removal.		
Impact measurement	Strategic work has an outcome contract and baseline before launch.		
Impact measurement	Evaluation strength matches the decision and claim.		
Impact measurement	Stop, improve, scale and sustain decisions are recorded and reused.		

INTERPRETATION

The total score can hide a critical weakness. Treat any capability below 40% of its available score as a constraint on the full system.

TOOL B | QUALIFIED PERFORMANCE REQUEST

Appendix B. Qualify demand before accepting a solution

Field	Decision or entry
Request title	Short name describing the performance need, not a learning solution.
Business owner	Named executive or operating leader accountable for the result.
Required result	What must improve, for whom, by when and under what conditions?
Current result	Current level, trend, variation and source. Mark unknowns.
Target result	Measure, target, population, date and tolerance.
Consequence	Customer, mission, revenue, cost, capacity, risk, safety or regulatory effect.
Affected work	Critical workflows, tasks, decisions, roles, locations and volume.
Known changes	Technology, process, policy, role, leadership, demand or market changes.
Evidence available	Operating data, observation, artifacts, interviews, assessments and comparisons.
Sponsor commitment	Access to people/data; owner for non-learning actions; application opportunity; outcome review.
Initial decision	Decline, route, rapid screen, focused diagnosis or full diagnosis, with reason.

Qualification questions

- What is happening that should not be happening, or not happening that should be?
- How do we know, and how large or variable is the gap?
- What would improve if the problem were solved?
- What has already been tried, and what happened?
- What decision has already been made, and what remains open to change?
- Why is learning believed to be part of the answer? What evidence would disprove that belief?

Appendix C. Performance diagnosis canvas

Canvas block	Questions and evidence
1. Performance gap	Required versus current result; population; trend; variation; consequence; baseline confidence.
2. Critical work	Tasks, decisions, outputs, handoffs, tools, conditions, exceptions and failure points.
3. Strong-performer comparison	Differences in action, judgment, support, experience, tools, workload and context.
4. Constraints	Expectations; process; tools/information; capacity; consequences; management/social support; knowledge/skill; readiness.
5. Evidence for and against	Operating signal, observation, people evidence, artifacts, assessment and alternative explanations.
6. Intervention logic	Primary constraint; minimum response; learning component; non-learning actions; owners; dependencies.
7. Outcome contract	Target behavior, operating measure, baseline, target, timeframe, cost, risk and evaluation tier.
8. Decision	Decline, route, pilot, improve or proceed; confidence; assumptions; what would change the decision.

TOOL D | SKILLS INTELLIGENCE

Appendix D. Build only the intelligence a decision needs

Field	Decision or entry
Decision use case	The workforce, talent, learning or redesign decision this data must improve.
Role/workflow	Local identifier, owner, population, location and future-state horizon.
Critical task	Observable task or decision connected to an outcome or risk.
Skill	Plain-language label and definition; external mapping if used.
Required proficiency	Behavior anchor, complexity, independence, quality, exception handling and evidence.
Current supply	Population distribution by proficiency, source, date and confidence.
Demand	Required population, timing, location and scenario assumptions.
Priority	Criticality, urgency, severity, exposure, scarcity and confidence-adjusted score.
Response	Build, buy, borrow, redeploy, automate, redesign or no action.
Stewardship	Business owner, skill steward, data owner, refresh trigger and authorized use.

Calibration protocol

1. Select three to five representative work samples or cases at different complexity levels.
2. Have assessors score independently using the behavior anchors.
3. Compare ratings, identify ambiguous language and discuss evidence, not status or reputation.
4. Revise anchors and examples until disagreements are explainable and manageable.
5. Document residual uncertainty and repeat calibration on a defined cadence.

Appendix E. Human-AI workflow canvas

Canvas block	Required entry
Outcome and boundary	Customer/operating result; start/end; users; systems; locations; prohibited uses.
Current workflow	Tasks, decisions, information, handoffs, controls, cycle time, quality, cost and pain points.
AI opportunity	Task-level value, feasibility, data, model/tool, expected improvement and uncertainty.
Work allocation	Human-only, AI-assisted, AI-generated with human approval or controlled automation, with reason.
Decision rights	Who briefs, approves, executes, verifies, overrides, escalates and owns the outcome.
Controls	Approved data/tools, access, provenance, verification, thresholds, logging, fallback and incident route.
Capability	Required fluency, task skill, domain judgment, verification, escalation and manager capability.
Pilot	Population, duration, baseline, measures, support, monitoring, stop conditions and review date.
Workforce effects	Role change, workload, skill gain/loss, inclusion, trust, consultation and transition support.
Scale decision	Evidence, residual risk, technical/operating readiness, cost, ownership and next action.

Agent task brief

Field	Decision or entry
Outcome	What finished result is required and who will use it?
Authority	What may the agent read, create, change, send, approve or transact?
Constraints	Data, policy, tone, source, time, transaction, location and prohibited-action boundaries.
Quality criteria	Accuracy, completeness, format, evidence, accessibility, safety and acceptance tests.
Approval points	Actions or outputs requiring human review before continuation.
Escalation	Conditions requiring stop, clarification, expert review or incident response.
Record	Required sources, assumptions, action log, output version and reviewer.

AUTHORITY RULE

Do not delegate an action, decision or data access that the human owner is not authorized to perform.
Approval and escalation points must be explicit before execution.

TOOL F | LEARNING-TO-PERFORMANCE

Appendix F. Plan transfer before designing content

COMPANION JOB AID

Use the Learning-to-Performance Planning Job Aid to work backward from business outcome and performance through behavior, consistency, practice, workplace application and learning.

Stage	Design entry
Target performance	Behavior/output, quality, conditions, frequency, consequence and operating measure.
Prepare	Purpose, prerequisites, mental model, examples and what must be understood before action.
Practice	Representative task, variability, tools, criteria, feedback, repetitions and independence standard.
Perform	Application assignment, timing, point-of-work support, access, expert help and escalation.
Reinforce	Manager routine, peer feedback, spacing, retrieval, reflection, recognition and barrier removal.
Improve	Transfer/outcome evidence, user feedback, failure patterns, content owner and change triggers.

Design acceptance checks

- A reviewer can trace every component to a target task, decision, constraint or outcome.
- Practice requires performance, not recognition of the correct answer alone.
- Feedback explains the gap and permits correction.
- People have an opportunity and permission to apply within a defined period.
- Point-of-work support has an authoritative owner and retirement rule.
- Managers know what to expect, observe, coach and escalate.
- Measurement can distinguish delivery, capability, transfer and operating outcome.

TOOL G | OUTCOME CONTRACT AND MEASUREMENT

Appendix G. Outcome contract and measurement plan

Field	Decision or entry
Decision user and date	Who will use the evidence, what decision will be made and when?
Business outcome	Measure, target, population, timeframe, accountable owner and strategic rationale.
Operating measure	Definition, baseline, trend, source, owner, frequency and known limits.
Critical behavior	Observable action/output, quality standard, conditions and evidence source.
Capability and constraints	Required capability and non-learning conditions included in the intervention logic.
Evaluation tier	Tier 1, 2 or 3, with reason, comparison and claim boundary.
Implementation evidence	Reach, access, readiness, use, fidelity, manager support and barrier resolution.
Outcome evidence	Capability, transfer, operating, business, financial and risk measures.
Cost	Design, delivery, participant/manager time, technology, support, measurement and ongoing cost.
Decision thresholds	Stop, improve, scale, sustain and investigate conditions.
Limitations	Missing data, bias, confounders, sample, measurement error and generalizability.
Decision record	Finding, confidence, claim, decision, owner, date and next evidence.

TOOL H | GOVERNANCE AND IMPLEMENTATION

Appendix H. Monthly council agenda

1. Review prior decisions, conditions and evidence due.
2. Qualify new priorities and assign diagnostic level.
3. Review diagnosis and capability evidence; decide intervention path.
4. Review pilot performance, risk and workforce evidence; stop, improve or scale.
5. Resolve ownership, data, technology, process, policy and capacity dependencies.
6. Confirm decisions, owners, funding, claim boundaries and next review dates.

Appendix I. 12-month implementation checklist

Phase	Acceptance checks
Months 1-3	Sponsor and lead named; priorities selected; current maturity evidenced; council charter approved; five minimum standards defined; baselines and data owners confirmed; practitioner cohort assigned.
Months 4-6	Integrated diagnoses complete; critical tasks/skills mapped; AI workflow redesigned where relevant; authentic practice and support built; outcome contracts signed; pilots running with stop conditions.
Months 7-9	Pilot decisions recorded; proven methods standardized; practitioners calibrated; service catalog live; shared records connected; portfolio review completed; obsolete processes retired.
Months 10-12	Additional priorities onboarded; executive scorecard operating; skill/capability refresh completed; low-value offerings retired; year-two maturity, portfolio, funding and owners approved.

Month-12 go/no-go questions

- Did business leaders use the system to make different or better decisions?
- Did at least two priorities show credible improvement, useful learning or a justified stop decision?
- Is the burden proportional enough that business units use rather than bypass the system?
- Are data, AI, privacy, risk and employee safeguards working in practice?
- Which capability is now the constraint on scale, and what is the smallest year-two investment that addresses it?

EVIDENCE FOUNDATION

Endnotes and source notes

The five-capability model and implementation methods are an evidence-informed operating recommendation developed for this playbook. They are not an ISO, OECD, NIST, WEF, CIPD, ILO or GAO framework. The sources below support the direction of travel and selected design considerations. Legal and regulatory references are general information and should be verified for the organization's jurisdictions and use cases.

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CLOSING STANDARD

Judge the strategy by the decisions it improves

A 2027 L&D strategy should not be judged by the number of programs launched. It should be judged by whether the organization makes better capability decisions, redesigns changing work responsibly, helps people perform when it matters and redirects investment using credible evidence.

THE FINAL TEST

Did L&D help the organization solve the right problem, build the capability that mattered, change real work and make a better investment decision?

That is the shift from a catalog of programs to an enterprise capability operating system.