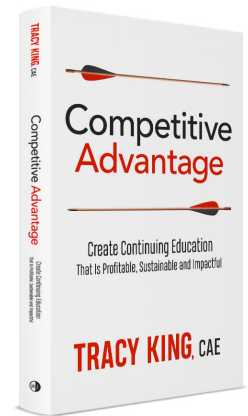


Competitive Advantage

Create Continuing Education That Is Profitable, Sustainable, and Impactful

by **Tracy King, CAE**



Contents

Internal & External Forces
Page 2

Education Strategy
Page 2

Learning Design
Page 4

Strategy to Action
Page 4

THE SUMMARY IN BRIEF

Leaders within the professional association and continuing education industry are facing a turning point. As traditional formats for learning and common pricing models continue to fall, new competitors are streaming into the market and creating learning programs that are faster, cheaper, and poised to make larger companies irrelevant.

Throughout the chapters of *Competitive Advantage*, Tracy King details the hidden internal and external forces that affect organizations, effective education strategies, the powerful foundations for future strategies, how to gain perspective on existing portfolios, and countless other lessons that leaders in the professional association industry will find absolutely essential.

IN THIS SUMMARY, YOU WILL LEARN:

- How internal and external factors can have unintended consequences within an organization.
- How to identify, build, and demonstrate your organization's educational value.
- How to design powerful learning experiences.
- How to make separate elements of your organization work together to turn strategies into action.

Internal & External Forces

Many associations notice something not working in their learning portfolio and respond with a quick fix we hope will buy us time until we have the resources to dig in deeper and analyze the problem and potential solutions.

But because many programs are managed in siloed teams that don't always collaborate or coordinate, we assume that any issue we identify must originate within the program we know. But when we fail to acknowledge that our programs belong to a larger system of learning we offer to our constituents, our 'quick fix' could trigger a cascading failure. Meanwhile, constituents don't recognize the distinction between elements of your organization—they see a failure in one area as a failure overall.

Quick fixes won't solve pain points like insufficient budgets, struggles when managing emerging technologies, failure to confront market changes, or problems implementing innovative changes within your organization.

Your organization needs to identify the root causes of pain points, whether they're resulting from external factors or internal issues. External factors might include market forces, evolving trends like the freelance economy and generational shifts, and industry forces.

Within each challenge is the seed of a solution—the opportunity to transform challenges into advantages. Individuals and organizations that are interested in real fixes rather than quick bandages will discover that this leads them to their essential first step—identifying a new value proposition.

A New Value Proposition

Simply having a portfolio of learning options is not enough. For many industries, members are interested in a trusted source for earning continuing education credits—but they have more options to consider than ever. Professionals are asking—*Why you, why me, why now, why this?*

By asking yourself these exact questions, you can help identify your own value proposition. Most important is to recognize that adults don't want to just go to programs, they want to grow from programs. For your learning portfolio to truly matter, it must lead them to take action that then leads to improved performance. Your value proposition should be defined, not just vague. It should include ways to help your learners reach measurable goals—earning back an hour of their day, becoming more effective leaders, improving financial processes to mitigate risk, etc.

These aren't topics, they're results. Your learners don't want to know what you're going to discuss, they want to know what behaviors or circumstances they're going to be empowered to change as a result of having completed your course or lesson. This can all be summed up with one word—**transformation**. Your new value proposition for continuing education is transformation. It deals with how your learning portfolio will help learners transform themselves, their lives, and their organizations.

The most important drivers for developing a profitable and sustainable business around your learning portfolio can be divided into three main segments—strategy, portfolio management, and learning design.

Strategy involves incorporating your organization's overall education objectives, the content domain you're dedicated to delivering on, and your plan for meeting those objectives with your education portfolio. An effective strategy encompasses all of your organization's education programs and seeks to position them correctly in the market.

Portfolio Management is all about building your learning portfolio around efficiencies in content development, deployment, and member experience. This should involve coordinating programs to develop learning pathways and aligning talent within your organization with the member experience you want to deliver consistently.

Finally, **Learning Design** addresses the critical drivers required to design transformational learning experiences. Producing transformational learning experiences incorporates the best practices of instructional design, those that are most marketable and impactful.

Education Strategy

Where we're at with our work can heavily influence how we see our overall strategy, much like how viewing a natural landscape from different vantage points can dramatically influence our perception of that landscape. It's vital to coordinate our views from the 'trenches' of day-to-day tasks, slightly more elevated viewpoints that let us glimpse a bit of the past and future, and high-flying vistas where we can see our entire company, industry, and market.

In the 'vista view,' it's vital that you have a comprehensive education strategy for your association. Many associations simply create educational content without developing an overarching strategy that guides their decisions. This leads to inefficiencies,

failures, and poorly executed educational strategies.

Your strategy should be led by the following strategy drivers—market intelligence, strategic objectives, target audience, content priorities, program pricing, technology infrastructure, internal partnerships, external partnerships, resource allocation, and evaluation strategy.

For each of these drivers, you and your organization need to review how you rate yourself. Rate a driver as ‘red’ if you’re not doing this at all, ‘yellow’ if you’ve taken a few steps towards accomplishing it but haven’t mastered it, and ‘green’ if you’re already gaining momentum and mastery at it.

If you rate your Strategic Objective driver as red or yellow, ask what next steps you’ll commit to establishing this critical foundation for your organization. What opportunities for alignment with your strategic objectives do you notice that could produce some quick wins for your association? This is the first step to creating a truly effective education strategy.

Setting Your Strategic Foundation

Failing to develop an education strategy can lead to major ramifications, including lost profits, lost momentum lost interest, technology barriers, missed partnership opportunities, and misused resources. Even companies that are making steps toward developing a strategy make common key mistakes.

The first mistake is choosing objectives that aren’t measurable. Ambiguous objectives mean you don’t have to deliver any bad news about not measuring up, but it also means you’re not really aiming for something specific. That results in actions that lack direction.

Another mistake is a sketchy implementation plan, which makes gaining any real traction very difficult. Lack of alignment is a similar issue. Priorities and resources must align, or your organization will be setting itself up for failure. This can also happen when you assign the wrong talent to implement certain tactics.

Finally, failure to follow through is a major issue that can derail your association’s strategy. When change feels challenging, or members of your organization are loudly opposed to a new approach, it can derail your follow-through. Then it’s easy to end up on a hamster wheel of sorts where your association only talks about change without ever making change.

But even more important than discussing the potential problems that come from failure to operate with a portfolio perspective, it’s vital to understand the potential gains of

operating within that perspective.

Portfolio Perspective

Just as creating an education strategy requires focus on key drivers by which you can rate your organization, portfolio management carries its own set of key drivers. These are your business plan (including product-level objectives, target audience, content priorities, program format, user experience expectations, budget, pricing structure, marketing goals, and success metrics), portfolio evaluation plan, program policies, learning environment, content calendar, learning pathways, education technology management, and customer service.

Rate all of these drivers within your organization using the same red, yellow, and green metrics we used earlier. From there, you have everything you need to begin strategically leveraging your learning portfolio.

Don’t Feed the Silos

Regardless of all the institutional needs, strategies, curriculum, courses, learning designs, or technologies that make up our organizations, the potential of our associations to create meaningful learning and profitable operations doesn’t come from any of them. They come from you—the people that make up your association. Allowing talent to become siloed can lead to major problems, and it’s a result of not implementing a portfolio perspective. This can lead to persistent siloes, with teams that have their own agendas and act in their own best interests. These negatively impact organizational culture and the member experience. It can also lead to program competition rather than cooperativeness, creating mini-kingdoms where information is less likely to be shared and that experience turf wars, resource grabs, and lack of trust—all resulting in poor decision-making. You’ll also experience piece-meal programs, hidden performance issues, inconsistent policies, and sustainability failure.

If you’re in the red zone for any Portfolio Management Drivers, begin your efforts by thinking about the role each program in your portfolio will play to advance your strategic objectives. Then craft your portfolio evaluation plan.

Learning Design

Many associations hope for quality learning to happen by sheer luck, but the ability to ensure learning success by design is within the capability of your organization. When you apply instructional design to your learning opportunities, you create learning that offers the three Ms—mean-

ingful, memorable, and measurable.

Meaningful content is relevant. It solves a problem, increases skills, and is something that learners can use *right now*. When that content is truly memorable, presented as an experience rather than just information, it's able to create those meaningful effects rather than being forgotten as soon as learners walk out the door. Finally, great learning is designed to meet measurable objectives, so that learners can evaluate their progress over time.

Learning design drivers that you should use to rate your organization are instructional design, competency development, learning evaluation, design process, transformational learning tools, visual design, and SME development. Use these drivers to help create a qualified pipeline for your industry, help professionals upskill and retool to meet changing demands, amplify their professionalism in your industry, define the competencies that will distinguish high performers, and lead the way to a successful and satisfying career through mastery.

Paper Airplane Potential

If people leave a session or course and do nothing, we have failed. Simply presenting information is like placing a stack of paper on the table and asking people to make a paper airplane. Rather, you should be offering fold-by-fold experiences. You and your learners should prototype paper airplanes together, test how different folds result in different flight arcs, and then debrief. *How could you use airplanes like this? What modifications might you make? When do you think you'll implement this new airplane-folding methodology within your context of practice?*

To maintain your competitive advantage, become the organization that not only provides paper and folding techniques, but offers pathways to folding mastery. Show the way. Be the way.



As Chief Learning Strategist & CEO of InspirEd, Tracy King leverages her more than 20 years in the industry consulting with organizations on education strategy and learning design. She advises associations on how to grow a reliably profitable and sustainable CE business that transforms learners. Tracy specializes in the intersection of learning science and technology. She's a thought leader, invited speaker, author, and DELP Scholar.

Competitive Advantage: Create Continuing Education That Is Profitable, Sustainable, and Impactful by Tracy King, CAE © 2020 Tracy King, CAE. Summarized by permission of the publisher, Morgan James Publishing. 182 pages, ISBN 978-1642793680 Summary copyright © 2019 by Soundview Book Summaries®

Pivot Pain

If the results from making changes within your organization are so essential and, in many cases, so obvious, why do so many associations fail to make those changes? Because change is uncomfortable. Pivoting can hurt, because it pushes us out of the routes we're familiar with and forces us to try something new. That brings risk, and with risk comes doubt.

But feeling uncomfortable or doubtful doesn't mean that a change isn't worthwhile. Both external and internal factors can lead to barriers against change, but only by overcoming these barriers can we master our education strategy, portfolio perspective, and learning design. If you want to beat the market to new and uncharted places, you have to step onto the rocket. And stepping on the rocket requires you and your association to sacrifice the familiar for the truly effective.

Strategy to Action

The way you do business in the continuing education market has been disrupted. Acknowledge and accept this. The way professionals develop their careers and access learning resources has changed. To meet these new conditions, you must disrupt the status quo.

Become the organization that sets its strategic goal sites and aligns resources to meet them—creating a runway to reliable profit. Become the organization that maximizes its entire learning portfolio to meet market needs while raising the bar on team collaboration and efficiencies, initiating practices that produce sustainability.

Become the organization dedicated to learning transformation that's vital to workforce development—driving measurable impact. Begin where you are. You've got this!