

# Training Portfolio Review

*A Framework to Improve Engagement, Efficiency, and Competency*

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# Table of Contents

- ✓ Executive Summary
- ✓ Pillar 1: Ongoing Assessment
- ✓ Pillar 2: In-Training Engagement
- ✓ Pillar 3: Training Efficiency
- ✓ Pillar 4: Post-Training Competency
- ✓ Implementation Roadmap

## Executive Summary

This Training Portfolio Review presents a scalable, evidence-informed framework for strengthening the effectiveness, efficiency, and long-term impact of an organization's training ecosystem. The approach focuses on improving three core performance levers essential to high-performing learning environments: in-training engagement, training efficiency, and post-training competency.

The model modernizes delivery through a flipped classroom approach, shifting foundational content into short pre-learning modules and reserving live sessions for practice, modelling, and real-time coaching. This reduces unnecessary "time-in-chair" while increasing relevance, learner ownership, and transfer of learning. A complementary Digital Resource Library provides ready-to-use job aids and templates that streamline preparation and support consistent delivery across teams.

Engagement is strengthened through experiential learning, grounded in the 70:20:10 model. Scenario-based micro-modelling, structured rehearsal, and a lightweight Social Learning Network ensure that learners remain active participants and have ongoing peer support beyond the session.

Post-training competency is reinforced through a Micro-Learning Library, Structured Follow-Up, and a 30-Day Competency Assessment that measures long-term retention rather than short-term recall. These elements create a continuous reinforcement loop that improves fidelity and informs ongoing curriculum refinement.

A phased 12-month implementation roadmap guides the rollout—from foundational audits and pilot testing to full-scale adoption and annual review. By the end of the first year, the organization will have a streamlined, data-driven training system that improves engagement, reduces training time, strengthens competency, and supports stronger performance outcomes across the workforce.

# Pillar 1: Ongoing Assessment

Ongoing assessment is most effective when it measures what truly matters: relevance, transferability, and real-world impact. To achieve this, organizations must move beyond surface-level satisfaction data and intentionally gather deeper, utility-focused insights that identify where improvements will have the greatest effect on performance.

## Shift Towards Utility-Focused Measurement

Traditional satisfaction surveys provide helpful sentiment data but do not reliably predict performance, transfer of learning, or long-term impact. This framework shifts the emphasis from satisfaction-based feedback to utility-based measurement, which evaluates how useful learners perceive the content to be in their day-to-day work.

When learners see clear value – when training helps them solve real problems, meet expectations, or support clients more effectively – they naturally demonstrate higher buy-in, stronger participation, and more consistent application of skills.

## Introduce a Ranked Feedback System

Likert-scale surveys often produce polite, neutral, or overly positive responses that obscure meaningful insights. To generate actionable data, this framework introduces a ranked feedback system.

### How It Works

Learners rank components of the training in order of utility. This structure forces differentiation:

- There must be a “most useful” and “least useful” component
- No item can remain neutral
- Patterns emerge quickly across large groups

### Why It Works

- It bypasses positive-response bias
- It reveals relative strengths and weaknesses
- It highlights where efficiencies can be made
- It directs attention to the areas with the highest potential for improvement
- It supports continuous improvement through targeted refinement

## **Example Applications**

- Ranking modules within a multi-day training
- Ranking instructional strategies (e.g., scenarios, demonstrations, discussions)
- Ranking job aids or tools introduced during training
- Ranking micro-learning assets for follow-up

## **Using Utility & Ranking to Drive Deep-Dive Reviews**

Once trends emerge—such as a consistently low-ranked module or a high-utility component—L&D can conduct targeted deep-dive reviews to understand:

- What is working
- What is not
- What barriers exist
- What improvements will have the greatest impact

This creates a transparent, data-driven continuous improvement loop aligned with best practices in curriculum evaluation.

## **Pillar 2: In-Training Engagement**

Increasing engagement is not about entertainment; it is about active, applied, experiential learning that directly supports performance. This pillar is grounded in the 70:20:10 model, where meaningful learning occurs through practice, feedback, and real-world application.

### **Scenario-Based Micro-Modelling**

Each session begins with an anchor scenario—a realistic situation tied to a core content module or common workplace challenge. The facilitator micro-models the scenario for approximately two minutes, demonstrating how the interaction might begin and highlighting key decision points.

Following the model:

- Learners rehearse the scenario with a partner
- They present or debrief their approach with the group
- The facilitator provides targeted feedback and troubleshooting

Because foundational content is covered in pre-learning, synchronous time is not spent on explanation. Instead, learners are active, practicing, and receiving real-time coaching that strengthens confidence and competence.

### **Active Learning as the Default**

With pre-learning handling the “what,” live sessions focus on the “how.” This shift increases opportunities for:

- Roleplay
- Peer feedback
- Case analysis
- Troubleshooting real challenges
- Facilitator modelling and coaching

Engagement becomes the natural outcome of purposeful, applied learning design.

## **Build a Social Learning Network**

Engagement continues beyond the session through a lightweight Social Learning Network, which may take the form of:

- A Teams or SharePoint community
- A rotating peer-support roster
- An informal “phone-a-friend” model
- A curated list of experienced colleagues willing to share insights

The goal is to reduce isolation, deepen understanding, and reinforce application in real contexts.

## **Combined Effect on Engagement**

By integrating micro-modelling, scenario rehearsal, and social learning supports, engagement becomes active, applied, and sustained. Learners move from passive observation to hands-on practice, supported by peers and reinforced through real-time coaching. This structure strengthens confidence, improves skill transfer, and reduces the amount of synchronous time required to achieve meaningful competency.

## **Pillar 3: Training Efficiency**

Training becomes more efficient when it is built on a core belief: learners are professionals who can be trusted to engage with pre-learning, prepare independently, and apply new skills with confidence.

### **Implement a Flipped Classroom Model**

The flipped classroom model shortens synchronous sessions while strengthening learning outcomes by shifting foundational content into pre-learning modules and reserving live time for practice, coaching, and application.

The structure of this model is straightforward: pre-learning modules introduce core concepts and baseline knowledge; live sessions focus on modelling, rehearsal, and applied strategies; and follow-up activities reinforce transfer and competency.

This approach respects learner expertise and reinforces shared accountability for learning.

### **Develop a Digital Resource & Job-Ready Asset Library**

A centralized Digital Resource Library provides ready-to-use tools that learners can immediately apply during and after training, including:

- Printable handouts and job aids
- Step-by-step guides
- Workshop-ready templates
- Demonstration scripts
- Scenario packets
- Checklists and quick-reference tools

This reduces time spent explaining or creating materials during sessions and ensures consistency across teams.

## **Combined Effect on Training Efficiency**

Together, the flipped classroom model and the Digital Resource Library create a streamlined training ecosystem where foundational knowledge is built through pre-learning, live sessions are dedicated to practice and coaching, and job-ready tools support immediate application. This structure reduces the amount of synchronous time required while maintaining depth and quality. In many cases, it also strengthens engagement and competency by shifting the learning experience toward active, applied, and learner-driven practice.

## Pillar 4: Post-Training Competency

Improving post-training competency requires deliberate reinforcement, structured follow-up, and accessible tools that support learners long after the session ends.

### Build a Micro-Learning Library

Short, mobile-optimized modules (3–5 minutes each) provide:

- Quick refreshers
- Step-by-step demonstrations
- Scenario walkthroughs
- Key pedagogical concepts

These modules keep the training “live” and accessible long after the initial workshop.

### Implement Structured Follow-Up

Learners rarely reach out after training, even when they need support. Structured Follow-Up ensures proactive touchpoints at strategic milestones, such as:

- One month after training
- Before first delivery
- Immediately after first delivery

This reinforces learning, builds trust, and strengthens fidelity.

### Introduce a 30-Day Competency Assessment

To measure meaningful retention, assessment occurs **30-days after training**, not immediately after. The structure includes:

- A pre-test
- No same-day post-test
- A single post-test at 30-days

This provides a more accurate picture of long-term competency and feeds directly into ongoing assessment.

## **Combined Effect on Competency**

Together, the Micro-Learning Library, Structured Follow-Up, and 30-Day Competency Assessment create a comprehensive reinforcement system that strengthens long-term retention, improves fidelity in learner-delivered training, and builds confidence through ongoing support. By combining accessible tools with proactive touchpoints and meaningful assessment, this pillar transforms training from a single event into a sustained learning journey that promotes continuous improvement and measurable growth in competency.

# Implementation Roadmap (12-months)

This Training Portfolio Review is supported by a phased, 12-month implementation roadmap designed to balance strategic planning with rapid, visible improvements. Each phase builds on the last, ensuring that enhancements to engagement, efficiency, and competency are introduced systematically and reinforced through continuous assessment.

## Quarter 1 — Foundation, Alignment, and Audit

- Conduct needs analysis
- Audit curriculum and delivery methods
- Map training to organizational KPIs
- Begin pre-learning development
- Design Digital Resource Library structure
- Establish baseline metrics

## Quarter 2 — Pilot, Prototype, and Early Wins

- Launch flipped classroom pilots
- Develop early micro-learning modules
- Release first version of Resource Library
- Introduce utility-focused and ranked feedback
- Design 30-Day Assessment framework
- Establish Social Learning Network structure

## Quarter 3 — Scale, Reinforce, and Strengthen Fidelity

- Scale flipped classroom model
- Expand Micro-Learning Library
- Launch 30-Day Assessment
- Implement Structured Follow-Up
- Roll out Social Learning Network
- Refine Resource Library based on usage

## **Quarter 4 — Evaluate, Optimize, and Institutionalize**

- Conduct annual curriculum review
- Analyze utility, ranking, and competency data
- Identify high-impact updates
- Optimize micro-learning and resources
- Formalize continuous improvement cycle
- Prepare year-end impact report

## **12-Month Impact Summary**

By the end of the first year, the organization will have:

- A modernized, efficient training ecosystem
- A scalable flipped classroom model
- A robust micro-learning library
- A digital resource hub supporting fidelity
- A structured reinforcement system
- A data-driven assessment model
- Stronger learner confidence and performance outcomes