



## Who Decides? Bringing Sanity to Managing Your Learning Portfolio

Leading Learning Podcast  
Transcript for Episode 476

Celisa Steele: [00:00:03] If you want to grow the reach, revenue, and impact of your learning business, you're in the right place. I'm Celisa Steele.

Jeff Cobb: [00:00:10] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:16] In many learning businesses, decisions about what to offer don't come consistently from one clearly defined place. Instead, decisions about what to offer are shaped by committees, volunteers, subject matter experts, executives, and staff across the organization.

Jeff Cobb: [00:00:33] Having a lot of people involved is not necessarily a problem. But it is a problem when it's not clear who owns the portfolio and who has the authority to make key decisions about it.

Celisa Steele: [00:00:44] That lack of clarity has consequences. You can end up with scattered offerings, duplication, inconsistent pricing, weak prioritization, and very little discipline around what should be improved, rethought, or retired.

Jeff Cobb: [00:00:58] In this episode, we want to talk about what happens when responsibility for the learning portfolio is too dispersed, why that's more than a low-grade nuisance, and what it takes to bring greater coherence to how decisions get made.

Celisa Steele: [00:01:13] We'll look at what this problem tends to look like in practice, why input is not the same thing as decision rights, and why intentional portfolio management starts with being clear about who decides what.

Jeff Cobb: [00:01:25] Because decisions about your learning portfolio are being made one way or another, the question is whether they're being made consciously, coherently, and by the right people.

Celisa Steele: [00:01:36] We'll start by explaining, a little bit more, a pattern that we tend to see repeatedly in organizations that we work with on the consulting side of things, especially association learning businesses—in brief, that many people have a hand in the learning portfolio.

Jeff Cobb: [00:01:55] Your average association in particular—though this can apply to many types of learning businesses—is going to have committees, volunteers involved, subject matter experts (usually a subset of those volunteers), often executives weighing in (not necessarily executives who have any responsibility for the learning function), and different staff groups who have different needs related to education that are charged with delivering that may or may not fall under whoever is in charge specifically of learning at the organization.

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Celisa Steele: [00:02:27] As you already pointed out, Jeff, we don't see having a lot of people involved necessarily as a problem. In fact, when a lot of people care about education and learning, that can be a good thing. But a problem arises when too few people have clear responsibility.

Jeff Cobb: [00:02:45] Clear responsibility and clear accountability around the decisions that get made. And the result of that, which we see so often, is an incoherent portfolio. You get scattered offerings, duplication (of effort, of content), inconsistent pricing, weak prioritization, and little discipline around sunseting. Basically, we see catalogs and the portfolio of offerings essentially accumulate over time in a scattered fashion.

Celisa Steele: [00:03:15] That's the pain point that led us to want to have this conversation today. What this looks like in practice—to go a little bit deeper—is that very often you might have one committee making decisions around Webinar topics, but then you might have an entirely different committee that is looking at conference session submissions, for example.

Jeff Cobb: [00:03:38] In fact, in both of those areas, you might have multiple committees doing those things. You're lucky if it's just one committee. You might have one department that handles the annual conference and other events, and then another one that's handling things like online courses or seminars that the organization offers.

Celisa Steele: [00:03:56] And these committees / departments / groups are not necessarily talking to one another. Even when everything technically sits under the umbrella of an education department, it's still possible that no one is truly seeing the whole portfolio. And, as you said, not just having a responsibility for that but also having accountability around that.

Jeff Cobb: [00:04:19] Yes, and this is especially true in organizations where there are a lot of committees or multiple departments across the organization that either have a need to or are charged with creating some form of educational content to serve their particular constituents, which is all legitimate, but it gets hard to know what's going on where. And, again, those things we've already talked about—duplication and that sort of stuff—are occurring all the time. And what can often happen in those sorts of organizations is that education staff get treated as service providers or implementers rather than business stewards, people who are strategically leading a learning business forward and have a coherent and cohesive vision of what's happening.

Celisa Steele: [00:05:07] When you're saying that they get treated as service providers, other groups might come to them with essentially an order, saying, "We need...."

Jeff Cobb: [00:05:14] "Make this Webinar for us."

Celisa Steele: [00:05:15] Exactly. And then the education staff aren't necessarily empowered or expected to push back and say, "Well, hey, is a Webinar actually the right format for that?" Or, "How do you know that this is the right topic?" Or any of that sort of vetting. It's more that they say, "Okay," and then they head off and do their job to produce that Webinar. So what ends up happening is—because of all this fragmentation and different folks involved, and if there is no clear accountability and responsibility—you have the proverbial one hand not knowing what the other hand is doing, and the portfolio then reflects that.

Jeff Cobb: [00:05:51] All of this is more than just an org chart issue. It's more than just an annoyance. I imagine we've probably already got some heads nodding out there, and listeners probably recognize that this is a real business problem. This is fundamentally an issue with

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running a learning business effectively. It impacts revenue, it impacts resource allocation, and it has significant opportunity costs that go with it.

Celisa Steele: [00:06:18] That's right. If staff are producing a large number of offerings and doing that primarily because various groups are requesting them, that's going to keep them busy, which means they're going to have less time for what might be more important, more strategic work. That speaks to that opportunity cost that you just mentioned, Jeff.

Jeff Cobb: [00:06:38] In this situation we're talking about, decisions about things like modality, for example, will often get bundled into content requests without being examined. You get the request for "a Webinar on X," and that may identify a real and legitimate topic need. Often, you're going to be getting that from a volunteer, committee, or something like that, and they know the field or industry they're serving. They know it's a legitimate topic. But that may not be the right format or product response. They don't have the understanding of what formats are going to align with what learning objectives and what business objectives.

Celisa Steele: [00:07:17] It could be that, instead of a Webinar on X, you need a journal article or a deep-dive course on X. What's happening in all these situations is accidental governance. Rather than having deliberate, conscious, and well-informed decision-making, you're running on "the way we've done things" and a more ad-hoc, hodgepodge approach to governing what goes into your portfolio.

Jeff Cobb: [00:07:46] What we're arguing for is not necessarily more (or less) bureaucracy. It's getting at the heart of how real decisions about the business are being made and how you get a clear process around that.

Celisa Steele: [00:08:06] One of the key distinctions that we want to touch on is that input is not the same as decision rights.

Jeff Cobb: [00:08:16] Committees and subject matter experts can provide valuable input on topics, on needs, on realities from the field/industry/profession. But that input should be a point of departure, not the final answer—not, like we just talked about, where "It's going to be a Webinar on X; go make it."

Celisa Steele: [00:08:37] Like you said, that input can be very valid, but it's not necessarily the final determination. It's not the final determination about content, modality, or even that anything needs to be done. Because, again, there needs to be some level of professionalization around how these decisions are being made, and usually it's going to be education staff who, for example, understand better which modalities can serve which purposes or instructional designers who understand which types of activities might support the specified or desired learning outcomes. You want to work in collaboration with your volunteers and subject matter experts, but ultimately decision-making needs to reside at a higher level.

Jeff Cobb: [00:09:23] In addition to modality, design, those sorts of things, there is the business side of this. How do you price things? That certainly should not be coming out of a committee. That, again, should be left to professionals, which may be the education staff or the education staff in collaboration with marketing, with finance. But you want the people who have the expertise and the experience and are looking at the learning business as a business to be making those sorts of decisions.

Celisa Steele: [00:09:51] There's a hidden or shadow problem underneath the problem that we've been talking about. The issue often gets interpreted as, "We have too many cooks in the

kitchen.” “There are too many people involved in these decisions.” “The committees are making things messy.” That’s the interpretation because it’s easy to see those aspects of it. It’s very visible when you have a lot of committees. It’s very visible when you have a lot of people contributing input, but, underneath, there’s a more fundamental breakdown—the organization hasn’t been clear about how portfolio management is supposed to work.

Jeff Cobb: [00:10:30] It’s a process issue in the sense that there’s not a common understanding of how that decision process is supposed to flow, which should be, to start with, someone has to coordinate the information needed to make good decisions and be responsible for there being good information and that information being available to people. Then someone has to turn that information into possible offerings or moves that you’re going to make with your portfolio.

Celisa Steele: [00:10:59] Then somebody has to look at those ideas of possible offerings, portfolio moves, and say, “Okay, this is what’s going to need to be created. This is what we’re going to need to update. This is what we’re going to need to get out of our portfolio entirely and sunset it.” Of course, once those decisions are made about what’s being created, maintained, or sunset, someone has to make sure that those decisions are enacted, that creation gets done, that the item gets removed from the online catalog, and so on.

Jeff Cobb: [00:11:34] In many organizations, that whole process is diffuse. All of those stages are fragmented. There may be somebody nominally in charge, but it’s not clear who truly has responsibility/accountability for the decisions. And the four steps of the process are not being tightly coordinated and accounted for in the way they should be. So, if you start with, one, gathering and synthesizing input/data, someone has to be ultimately accountable for and responsible for that happening. It doesn’t mean that they’re doing all of it. There’s probably going to be multiple people involved in giving that input and looking at that data. Somebody has to be responsible, though, for that happening on an ongoing basis for the organization. From our perspective, that’s probably the learning business leader, who’s making that decision. Certainly, it is a staff person. That should not be allocated to a committee or a board. And, if it’s not the learning business leader, then it needs to be somebody who’s been clearly deputized within the learning business to say, “This is your role. This is what you’re accountable for.”

Celisa Steele: [00:12:40] You said probably not a board, probably not a committee. Again, to be really clear, a committee may be providing some of that input.

Jeff Cobb: [00:12:48] Probably will be, yes.

Celisa Steele: [00:12:49] The board is probably providing some of that input, but again you have to have someone who is responsible for making sure that the appropriate input and data is gathered and synthesized.

Jeff Cobb: [00:13:01] And that the process is working and is achieving what it is supposed to be achieving. That’s for step one. Step two is generating and testing ideas. Again, you might have many people involved with that, but there needs to be a person who is responsible and accountable for that. Again, our view is that person should be on staff in the learning business, probably the learning business leader or somebody who’s been deputized to play that particular role.

Celisa Steele: [00:13:25] At this stage, you might be doing things like, “Okay, we’re going to develop a minimum viable product,” for example. This is the level of piloting and testing ideas or sending out an A/B e-mail test. This is what’s happening at that step. Again, you are

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probably pulling from a variety of sources, but somebody is ultimately responsible for generating and testing those ideas.

Jeff Cobb: [00:13:49] The person who's ultimately responsible and accountable doesn't mean that they are doing this work, hands-on. We're talking about leadership and management here. There needs to be clear leadership, management, and the responsibility and accountability that come with it for each step in this process. We've talked about gathering and synthesizing input and data, step one. Step two is generating and testing ideas. Step three is going to be making those explicit portfolio decisions. Certainly, learning business leaders should be responsible and accountable there. And then fourth is executing. Generally, it's not going to be the learning business leader who's designing and developing programs and that sort of thing, but that person needs to be accountable and responsible or have a clear deputy who is responsible for that aspect of the process.

Celisa Steele: [00:14:30] Again, management, oversight, leadership—not the hands-on work of it. But, still, somebody has to be responsible and make sure that execution is happening.

Jeff Cobb: [00:14:39] And this all needs to be clearly defined, communicated, and followed as a process.

Celisa Steele: [00:14:45] For the sake of the podcast, we're saying "somebody"—that somebody would be named in your organization. You would know who it is there. The other point to make about these four steps that you were talking through, Jeff, is that it's a loop. These are not linear steps—you start at one, and you end at four. This is a loop because, after you get to that step four, execution, there's going to be new data, and there's going to be more input, and you want to learn from those results. This flow from information to ideas to decisions to action is a cycle, and it repeats, and it's going to repeat, hopefully, ad infinitum, as long as you, as a learning business, are in business.

Jeff Cobb: [00:15:25] Right. That's a theme that runs through all of our tools and all of our work—all of this is cyclical. It repeats over time and improves over time.

Celisa Steele: [00:15:34] Let's talk a little bit about what this might look like in practice. We've been saying "someone," "somebody," but, as I just mentioned, you would ideally know in your organization who that somebody is. Not even ideally—you need to know who that somebody is. However, the reason we're using somewhat generic terms like "somebody" and "someone" is because we don't believe that there's a single best practice or a universal model for this.

Jeff Cobb: [00:15:58] So much of this comes down to just communicating very clearly, making sure people know what the process is, know what their role in the process is, know what the desired outcomes are, and who's going to be responsible and accountable for those outcomes. Better does not necessarily mean changes to your existing committee structure or to departments or units in your organization. But it does mean establishing clearer responsibilities, clearer accountability, and clearer decision rights throughout the process for the roles within the process.

Celisa Steele: [00:16:33] Part of that will be that the people giving input know what kind of input they're giving. Are they giving input around modality? Are they giving input more around what are the hot topics needed in the profession? You're really clear with them, and they're really clear with what you're going to do with the input that they're giving. A better approach to governance and decision-making means that there's going to be a visible party or

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parties who are responsible for overseeing the whole portfolio. Everyone's going to know who that person or who that small group is who is shepherding those four steps that we were talking about and who is ultimately responsible for what happens at each of those steps.

Jeff Cobb: [00:17:15] We find it is a smaller group of people than is often the case in many organizations right now. If you are a member organization, for example, you typically are going to have key committee members or key volunteers involved, but staff are really going to be guiding that. They're going to have the charge for making sure that it's operating correctly. And staff need to have the authority to make the business and product decisions that come out of whatever those groups are that are looking at the input and generating the ideas.

Celisa Steele: [00:17:48] Part of the reason why having that authority reside with staff is that, one, the staff are usually going to have some domain expertise around things like modality, or they're going to have better visibility into the business view of what to offer. And then, two, they're going to also have that view of the whole portfolio. So often a committee—like we were saying—is only hands-on around the development of content for the annual conference, and they might not really understand what you have in terms of self-paced online learning, for example. Both because of domain expertise and expertise of how the learning business is running as a learning business, it makes sense for staff to have the authority for decisions.

Jeff Cobb: [00:18:38] The bottom line goal here is that better amounts to being sure that someone, usually a small set of someones are seeing the whole portfolio, everything that you're trying to do from a learning perspective as an organization, and are making coherent decisions about it that somebody is ultimately responsible and accountable for.

Celisa Steele: [00:19:01] You said "coherent," and coherent decisions recall coherent actions, which call to mind strategy. Buried in what you were saying there, Jeff, is the fact that you cannot make sane portfolio decisions if you aren't clear on who you're serving and what role learning is playing in that service to those people.

Jeff Cobb: [00:19:24] It's very true, but we see organizations do it all the time. They start reworking the portfolio, assuming that adjustments here and there in the portfolio are the answer to everything, but they haven't understood or gotten to that underlying strategy as the touchstone that keeps all of the different input that you're going to get around portfolio decisions from just being noise and putting you in this place where action is hard to achieve, putting new things in is hard to achieve, and certainly getting rid of things is hard to achieve.

Celisa Steele: [00:19:55] Yes. Without that touchstone of strategy, every request can sound reasonable and even equally important. It gets hard to prioritize. But when you are referring back to the strategy, when you have that strategy in place, when everyone's using it as that touchstone, then decisions get easier. It becomes clearer to everyone involved why one idea gets the go-ahead, and another one gets sidelined.

Jeff Cobb: [00:20:22] This is the foundational part of everything we said about communication earlier—the strategy has to be clear, and it has to be clearly communicated to the people who are participating in the thinking and the decisions around your portfolio. If that's not there, then you're operating on shifting sands from the get-go.

Celisa Steele: [00:20:46] To say that again—because it's an obvious but such an important observation—before you can be clear about any of your portfolio decisions, you need to have clarity around what your learning business is trying to do.

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Jeff Cobb: [00:21:02] As we wrap up our discussion around portfolio management, portfolio governance, we want to offer some questions that can assist you in getting clarity around the right approach to the governance of education for your learning business.

Celisa Steele: [00:21:20] We have a handful of questions to suggest. If you answer these questions, it's going to give you the lay of the land. It's going to help you understand how things are currently operating in your learning business. Who is currently seeing the full learning portfolio?

Jeff Cobb: [00:21:36] It may be nobody. You need to make sure somebody is. If they aren't, then obviously you need to address that right away. The second one is who is responsible for gathering and synthesizing the relevant information, the data that you need to make good portfolio decisions?

Celisa Steele: [00:21:54] Where are ideas generated, and how are those ideas validated?

Jeff Cobb: [00:21:58] Who has the authority to decide what gets created, maintained, or sunset?

Celisa Steele: [00:22:05] Which decisions belong to staff, and which belong to volunteers or committees? Answering those questions is going to give you the current lay of the land. Then you want to re-ask those questions with a future orientation, with an eye to what would result in stronger offerings, a stronger learning business.

Jeff Cobb: [00:22:28] The first would be who should see the full learning portfolio? Hopefully, you have somebody who currently does, but is that the right person? Is that the right set of people going forward?

Celisa Steele: [00:22:41] Who should be responsible for gathering and synthesizing the relevant information, input, and data?

Jeff Cobb: [00:22:49] Where should ideas be generated, and how should they be validated?

Celisa Steele: [00:22:54] Who should have the authority to decide what gets created, maintained, or sunset?

Jeff Cobb: [00:23:00] And then which decisions should belong to staff, and which inputs belong to volunteers or committees?

Celisa Steele: [00:23:06] Again, back to a point that we opened with—decisions about your education portfolio are being made.

Jeff Cobb: [00:23:12] Obviously.

Celisa Steele: [00:23:14] The question is whether they're being made consciously, coherently, and by the right people. That's what we're encouraging you to assess and to evaluate.

Celisa Steele: [00:23:31] When the roles, responsibilities, and decision rights are fuzzy, your education portfolio usually falters.

Jeff Cobb: [00:23:39] Addressing governance issues around your portfolio should not shut out useful input from volunteers, committees, or subject matter experts. Cleaning up your governance should ensure that input is connected to a clear process for turning information into ideas, ideas into decisions, and decisions into action.

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Celisa Steele: [00:23:58] And it should ensure someone is seeing the whole portfolio and making coherent decisions about what gets created, maintained, improved, or removed.

Jeff Cobb: [00:24:08] You can find show notes, a transcript, and related resources at [leadinglearning.com/episode476](http://leadinglearning.com/episode476).

Celisa Steele: [00:24:16] And, if you find the Leading Learning Podcast valuable, please consider sharing this episode with a colleague or co-worker who's wrestling with portfolio decisions or education governance issues.

Jeff Cobb: [00:24:26] Thanks for listening—and see you next time on the Leading Learning Podcast.

*[music for this episode by Moarn]*

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