



Auditing Portfolios and Pressure-Testing Strategy with Lauren Brechner

Leading Learning Podcast
Transcript for Episode 488

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: [00:00:17] If your learning portfolio has grown more by accumulation than by design—a Webinar here, a course there, and nobody quite sure which ones are still earning their keep—this episode is for you.

Jeff Cobb: [00:00:29] Our guest in this episode, number 488, is Lauren Brechner, founder and principal consultant at Ember Forge, which partners with organizations to realize their business goals through custom e-learning strategy and development. Lauren comes to this work from a background in marketing and digital experience design, and her roots in audience segmentation, user journeys, and iterative testing shape how she approaches learning design.

Celisa Steele: [00:00:55] Lauren makes the case that a portfolio audit isn't just a housekeeping exercise—it can double as a pressure test of your strategy. Do your learning offerings reflect what you say your mission and vision are?

Jeff Cobb: [00:01:07] You and Lauren walk through what a portfolio audit looks like in practice and why she typically recommends organizations focus on a handful of flagship offerings rather than trying to fix everything at once.

Celisa Steele: [00:01:19] If you're sitting on a portfolio that's grown less by design and more by accumulation, we recommend you give a listen to this conversation with Lauren Brechner.

Celisa Steele: [00:01:34] Give us a thumbnail sketch of what Ember Forge does, who you serve, how you serve them.

Lauren Brechner: [00:01:39] Ember Forge is a learning strategy and development partner for organizations and learning teams, especially in the nonprofit, mission-driven, and association space. We step in as an end-to-end partner, from determining how learning fits into organizations' business goals to developing learning experiences to helping deploy and measure the impact of those experiences for both the organizations' business goals and their learners.

Celisa Steele: [00:02:04] Having talked with you before and read some about your background, you come from marketing, and you have digital experience design as well. What concepts from that world show up most in how you approach things now? I'm thinking of things like

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audience segmentation, user journeys, iterative testing. Maybe it's other things. But I would love to hear how that marketing and digital experience background influences what you do now.

Lauren Brechner: [00:02:34] Absolutely. All of those things that you mentioned. That experience has been foundational to how I approach learning and e-learning especially. I think about it as a pyramid where in one lower corner is the marketing side. How do we segment audiences? How do we identify who the right learners for the content are? How do we market that to folks who are going to purchase it—whether it's the learners themselves or organizations buying it on behalf of their employees—making sure that content resonates with them and they're the right receivers of that? And then how do we title a course to make sure it's actually representative of what the content is? Those simple things. The other corner would be that digital experience. I came from the association world, and my last role there was manager of digital experiences. Web sites, microsites, conference apps, anything digital where our members were interacting with us solely remotely—I managed that. And I learned a lot from how to get people from point A to point B, how to do it meaningfully, and how to make sure they gain understanding along the way.

Lauren Brechner: [00:03:47] What are people calling about, and how do we answer those questions upfront through the journey that we deliver them through in their membership journey? Those two things squish together and push up into how I approach learning. You get to the top of the pyramid, and that's where learning science, learning evaluation come into play, and the practices that make learning effective and contribute to long-term retention. It's not just about a good and nice learning experience—those are wonderful and nice. But, if you're trying to make long-term impact and do capability building, that learning science is essential. But the science can't get through to the learner, those impacts can't get through to the learner without making sure that's the right learner (marketing) and making sure they can traverse the course and experience it, which is that user experience design. So all of those things mesh together and have brought me to this holistic philosophy of how we approach learning.

Celisa Steele: [00:04:44] I love all three of those and this idea that you have the two squishing up into learning, as you said—that was very nice. But the marketing has to be there and has to be right, not just in the sense of promotion. You were talking about other things, other aspects of marketing there. And then that course, that user experience is so important because if it's too hard, then you have learners spending their mental bandwidth on something other than the peak, the top corner of your triangle, where they're actually engaging and, as you said, hopefully building true capability, not just completing a course.

Lauren Brechner: [00:05:21] Exactly. If they're trying to spend their energy figuring out how to get from one lesson to the next, you're failing the learner. They need to be spending that energy purely taking in the content. You need to curate that experience for them.

Celisa Steele: [00:05:33] Let's talk a little bit about what has to be in place before a learning business can build a product offering or, once they have that product offering, meaningfully assess that product that they have or that whole portfolio of products that they have—things like goals or target audiences, the business rationale that needs to be in place. Talk about what

has to be there before a product offering can exist or before it can be assessed and evaluated effectively.

Lauren Brechner: [00:06:10] Goals, target audience, business rationale—these are all things we can agree about on paper. But, in practice, that's where folks diverge. Here's my approach: A learning product can have multiple benefits, but it should solve for one primary problem. What is the one thing it's solving for? If there's a capabilities gap in an industry for an association, for example, and they want to help their members close that gap, that is the goal. That's the problem that they're solving for. The driver is equipping people with skills that help them succeed. So you'd start with prospective learner surveys to find out what they feel they need help with most. What's that gap? And then the content learning experiences need to address that gap as well. But, if it also drives revenue, great. If it also puts your name out there as an authority in this field, that's great. But the focus has to be the *one* problem you're solving for. That's not to say it can't do many things. On the other side of things, if it's a revenue driver first, those priorities shift. You can still create real impact with learning. You might choose a less expensive delivery method and work backward from a pricing model, and you might budget more aggressively for marketing and consider all of that upfront.

Lauren Brechner: [00:07:23] That doesn't mean revenue-driving offerings should be low-quality, that they should be a product you cash in on. It just means you're working within budget constraints from the start and then working backwards to maximize what you have in that budget. Every offering should also have goals. Launching a course is really testing a hypothesis, in my opinion. You may have research and expertise that give you the confidence in making those decisions, but the real test is putting it in front of real learners, especially if they're paying for the product. They're going to give you feedback. And before you put it in front of those learners, define your success metric upfront. If you are trying to bridge that capabilities gap, for example, maybe your goal is that 75 percent of those registrants actually complete that course, or half of them complete 90 percent of the course because that 10 percent isn't relevant for them. That's something you'll want to define early on. Or, if it's a revenue driver, maybe it nets \$20K in the next year or two after breaking even. Whatever it is, you need to define it and measure against it and then adjust delivery and content as you go.

Celisa Steele: [00:08:30] I really appreciate your comment. It's easy to agree, in theory, that goals are important, but you do have to get clear. Yes, it can do many things, but you have to have that agreement around what is the primary goal for this particular offering because that's going to drive so many of the decisions, not only into how the product is made and rolled out, but, to your last point, around how you assess and see if it's successful? I really appreciate that need for clarity and that need for agreement around a primary goal.

Lauren Brechner: [00:09:08] Exactly.

Celisa Steele: [00:09:09] I want to talk a little bit about a portfolio audit. That is something you help organizations with. From our own experience, often a learning business less than 100-percent intentionally lands on their portfolio of offerings—it's what amasses and aggregates over time rather than being a 100-percent thoughtful approach. What does a portfolio audit look

like in practice, and what do you measure existing courses against as you're making that decision about is this something to keep, to retire, or to modify and rebuild?

Lauren Brechner: [00:09:50] First, a portfolio audit relies on a clear mission, strategy, and vision from the organization. That's often the problem. As you said, a learning portfolio can grow over time because sometimes you're addressing an immediate need, and then the relevance isn't there. A misalignment between the learning portfolio and current state and the organization's real trajectory is a real problem. In an audit, you compare every offering against its ability to fulfill the mission and drive the vision. Are we doing what we need to do now, and are we going where we need to go? Practically, that starts with listing every offering in a spreadsheet—the year it was created, whether the topic is still relevant to the industry, how many registrations there have been over time, how many completions, are there assessments at the end, and how well are people doing in those? If you have learner feedback, what did they think of the course? What is their feedback on it? If courses are falling well below your threshold metrics (which you should define overall for each of those), you need to understand why and figure out a path forward. Another thing that is included in an audit is delivery method. A lot of organizations do Webinars, and they're very valuable, and then they have the recording and stick it in their library.

Lauren Brechner: [00:11:08] Sometimes those are hidden gems, and those might be incredibly relevant to the industry, but the recorded Webinar format just isn't delivering that learning impact like it really could. That's an opportunity for working with that same subject matter expert who delivered that Webinar and creating an online self-paced course. Those are the opportunities you want to look for. Once you get everything into a spreadsheet, you can decide what to do with that information. If several courses have high registration but low completion, and completion matters to you, that's a priority. It also helps to categorize everything by type—the self-paced courses, Webinars, conference recordings too. If there's a lot of registrations for those, that's an opportunity to develop something a little more robust. There are different lifts as well for each of these, so the effort is worth noting. If you are converting a Webinar to a self-paced course, you are taking on a completely different product type, and there's an effort with that. But if you're updating an existing self-paced course, that effort's much smaller. You can tweak that. Those are things worth noting too. What is the effort level on a scale of 1 to 10? And, to be clear, an audit doesn't mean acting on every single offering that's coming up in there. My usual recommendation is to identify a handful of flagship courses—three, five—that best align with the current strategy and that are driving the mission and vision forward and focus there.

Lauren Brechner: [00:12:35] Some of these libraries and portfolios have hundreds of offerings, and that is daunting. That is no small task. I'm not going to pretend like it is. But narrowing it down to, if we only had five offerings to represent what we're trying to do, what would they be? And just focus on them and what you can do with them. If it's a topic that's really important, but you're seeing it's underenrolled, that's not even a content problem necessarily—that's a marketing problem. That is something you do way in the front. And so you can get people in that course first by redirecting your marketing efforts and then evaluate their response so you actually understand. What we're looking for is all of those and also if there's a consistent feedback mechanism across all of your offerings. If you're comparing things on the

same footing, like the baseline Kirkpatrick Model (reaction, learning, behavior, results) plus topic-specific questions: Did this help me apply x more effectively in my job? Those are really important to have a baseline that you're able to compare them all against each other. My piece of advice, because this is a very overwhelming task, is to bring someone without a relationship to these offerings—folks who didn't create them, the subject matter experts who weren't featured in them, from outside your department or outside your organization—to pull that raw data and organize it objectively for a first pass.

Celisa Steele: [00:13:57] As you said, this could be a tremendous amount of work if you have a large portfolio, so talk a little bit about your thoughts on cadence. How often should a learning business be doing this sort of portfolio audit? There's probably a heavier lift upfront the first time you're putting such a spreadsheet together, but then you have it. And then going forward, it's more a matter of updating and adding the newer offerings to it and confirming that some of the past assumptions are still valid. But, yes, talk about cadence.

Lauren Brechner: [00:14:33] The first pass is the biggest lift. Once you've got that spreadsheet together or whatever database you're using to track this, number one, keep it updated. You have a new offering; it needs to go in that spreadsheet so you don't have to pull everything all over again. Update metrics as frequently as quarterly—if that's within your capabilities as an organization, just to see how those go, if there's an automated way you can do that—at least once a year. It depends on what makes the most sense. Don't drink the whole glass of water at once. Take a few sips. If you feel like you've addressed your top three courses, and you're seeing the impact...that period of time that you've piloted those changes is important to sit in. Making too many changes at once across your whole portfolio can be detrimental if your hypothesis is wrong. And so letting time pass to get that first hypothesis out there, get the feedback, and figure out, "Okay, this is a thing we should apply to all of our offerings," that's a piecemeal thing you can do. If it is "Let's add a survey to every offering we have—forget about the content; let's just have a survey there and make sure that's across the board," that's a great way of doing that. And then maybe each year, pick three more courses you want to evaluate. It's up to the organization to say, "What is our appetite for doing this? And what is our real capability?" Because you don't want to bite off more than you can chew because that's where you start to feel underwater, and that whole project can fall to the wayside.

Celisa Steele: [00:16:06] You've mentioned having a hypothesis at least a couple of times. Let's go a little bit deeper there, and, if possible, I would love to hear some examples of hypotheses or how you think about what goes into making a good hypothesis that then you're going to be trying to test.

Lauren Brechner: [00:16:23] Yes, I really like the scientific model there. I use the word "hypothesis" because sometimes we launch a course and say, "This is the product. Here it is. Enjoy it or don't." And then we just leave it out there to do its thing. If we're being good stewards of learning practices, we do need to listen to feedback, and we do need to have our assumptions tested. I'm a big advocate for pilots. Let's say we hope that folks who are in a leadership position in a specific industry that's at particularly high stress, we want them to be able to update their strategy every six months. And they, in current state, aren't able to because of all of the fires they're always putting out. The hypothesis is "We're going to put this training

together that will enable them to do that every six months.” You can have a survey at the end that says, “Do you feel this has equipped you to do that?” And they might say, “Yes, I feel like it did.”

Lauren Brechner: [00:17:23] Those end-of-offering and -course surveys tend to be much more optimistic than the reality. The way you test the hypothesis is follow up with them in six months. Send a follow-up survey saying, “Hey, did you actually do that?” And that’s where the real results come in. I talk about the forgetting curve all the time. We feel really ambitious once we’ve crammed on a certain topic or course, and we feel we can conquer the world sometimes, and then even weeks later it’s like, “Well, I don’t really know how to put this into practice.” So the measure is months from now: “Did we give them the tools and the skills to put that into practice?” And if they didn’t, they can say what the gap was. That’s the thing you need to build next. That is the part that needs to be adjusted for your next iteration.

Celisa Steele: [00:18:11] Let’s say you do something like what you just described. You put out a product that you think is going to help these leaders be able to adjust their strategy every six months. You follow up six months after to find out if they really were. Let’s say the results were amazing. They were able to do that. You’ve proven the hypothesis at that point. Except, then, the world changes. In your example there, would it be every six months on an ongoing basis you would continue to check in so that you are finding out is it still doing what it did based on our initial findings?

Lauren Brechner: [00:18:43] To do this, you have to have the courage to hear that what you put out there didn’t serve the purpose of what you were trying to do and be okay to hear that feedback—that’s an important place to come from. You shouldn’t be reaching out with the expectation that folks are going to continue to sing the praises of the product. You are essentially opening a can of worms that you probably wouldn’t open otherwise unless you do this touch point. Each time you do that, it will create a new level of work. Even as infrequently as every two years is a good starting point—if that feels like a lot for you—because a lot can change in two years, but it feels like an approachable cadence for things. So learners who took something a year before, see if you can reach out to them, and see if you can have a conversation about what they put into practice, what tools they use from the course, what they remember about the course—whether it was a specific speaker or an exercise. Anything that sticks with them can speak to how the retention is happening and things that are enabling these learners to do what they need to do. Every six months would be wonderful, but that’s a full-time gig right there just having someone get this feedback. Two years is pretty good and is a good start for that.

Celisa Steele: [00:20:04] Let’s go back to talking about a portfolio audit, about tying to the mission and the vision of the organization that is behind this portfolio. What happens if the underlying strategy isn’t there, if maybe the mission isn’t clear, the vision isn’t clear, or there’s not a coherent strategy around how they’re achieving that mission and going to reach that vision? If that’s not in place, what then happens to a portfolio audit? How radically does that end up limiting what you can do when you sit down to pull your spreadsheet or database together with all of your offerings and the various metrics?

Lauren Brechner: [00:20:48] We need to admit sometimes that tying anything to a strategy can be hard because it can feel so abstract, especially if the strategy isn't well defined or frequently talked about, and what it means in practice doesn't always translate clearly. I like to anchor to mission and vision instead because those feel more actionable and tangible. Mission is what you're doing, what you want to accomplish in the world. Vision is where you're heading. Those are helpful framings to start to make it a little bit more piecemeal. Strategy is more the nuts and bolts of how things happen across the organization, that overarching thing, but sometimes it feels too big. If we can even distill to mission and vision, that's really helpful. One mistake organizations make is...learning is part of your strategy. It needs to be embedded with that. Learning needs to be part of the discussion of strategy. There is some component of learning in any industry, any organization, whether it's internal training, external training, capabilities building, trying to inform people about certain things. That is part of every organization, and it needs to be embedded as part of the strategy. Does a weak strategy limit the audit? Yes and no.

Lauren Brechner: [00:22:03] Mostly, a weak strategy makes conversations longer. When you sit down to talk about the relevance, reach, and impact of your offerings, the understanding of that alignment may be at odds with someone else's, and that conversation is really important. You need to understand where someone else is coming from and how they're defining how learning drives towards your strategy, and then what you're thinking does that because those definitions may not mean the same things for you. A portfolio audit is a great way to pressure-test strategy and ask the question, "Are we doing what we think we're doing, and does our learning reflect that?" I think of it as holding up a mirror. Here's what you say you're doing, and here's what you're actually putting out there. Does that line up? And, if not, which side of that needs to shift? Does the learning portfolio need to shift to meet current strategy, or does the learning portfolio better represent what your mission and vision are? And the strategy might need to better encapsulate that because it better captures reality. Learning people should be in the room when we're talking strategic planning conversations for exactly that reason because, if there's a gap there, then you're telling two different stories, and you're reaching for two different goals.

Celisa Steele: [00:23:18] I really like that idea of the portfolio audit being this chance to pressure-test strategy in the way that you were just describing. But then also, as you alluded to earlier, sometimes what can happen as part of that portfolio audit is also a difference of opinions—"Which are our top products?" or "Why are they our top products?" If there is internal disagreement or lack of alignment around "These really are our flagship offerings," that probably does point to some level of strategy that's either unclear in general or certainly unevenly communicated within the organization.

Celisa Steele: [00:23:53] Now, we talked about learning experience/user experience a bit earlier, and it can be common for organizations to sometimes feel like they need new tools before they're going to be able to improve the learning experience. But I would like to hear how you think about the tech stack and what's possible at an organization with what they already have, without necessarily needing new systems to do what they want to do.

Lauren Brechner: [00:24:24] I came from the association world (I mentioned before), and you have to be a little scrappy. I think that was a really interesting perspective to bring into my career. Also, even in our personal lives, we've all blamed tools for our inability to accomplish

something, but that usually misses the real diagnosis. What's prompting the desire to improve a learning experience? Are people not signing up? Are they signing up but not completing? Are they giving feedback that the course didn't deliver the training results they'd hoped for? Those problems are almost always about content relevance, learning transfer, or marketing. It's not the tool set. Nearly any existing platform can address them. And that's why the portfolio audit matters so much—if you can define what that goal is for each of those offerings and adjust, in most cases you're going to uncover that it's content and marketing, and it is about applying the learning science to make sure that it has that impact over time. An LMS update is great. An LMS upgrade is great. There are wonderful tools out there that can do those things. But you want to pressure-test your content first, your marketing strategy first. And, after doing those things, once you feel like that's a solid foundation, you feel like you need a tool that can build upon that, that's the time to evaluate tools. We jump to the new shiny thing too frequently because there are a lot of promises out there about what it can do, but, if your content isn't up to par, then it's not really going to make a difference.

Celisa Steele: [00:26:05] I like that idea of thinking through “Why are you even considering new tech?” Because, again, that would put the emphasis on a hypothesis about what is or isn't working, and then it gives you a chance to test that. As you're saying, so many of the causes are not necessarily specific to one tool that you're using, and they tend to often point to bigger issues around marketing or content alignment with audience needs and all of that.

Celisa Steele: [00:26:31] One thing that we always like to ask guests is about their own approach to lifelong learning. Lauren, what are some of your specific habits, practices, or sources as you continue to grow professionally and personally?

Lauren Brechner: [00:26:47] My approach to lifelong learning is that learning happens every day, everywhere. You just have to be open to receiving and acting on it. I love a YouTube video, and I like to listen to audiobooks. But I also learn a lot through conversations with people who love what they do and do it well, hearing about their failures and their triumphs. Getting that perspective is a method of learning. You can read something on paper, and it will have a certain impact, but to hear a lived experience is really valuable. Something that we sometimes forget is that the experiences of others can be a method of learning. Also, I just love the podcast format. I started listening nearly two decades ago when the iPods were coming out, and Harvard Business School was putting out some of the first ones. I listen to them all the time while driving, cleaning, whatever, and it keeps me sharp and gives me time to reflect. And I also keep a digital notebook with me all the time. I'm thinking in all directions at all times. But if something hits me that I'm like, “I want to research that later,” or “Wow, that was a good point; that's a great perspective,” I jot it down so I can at least capture it and either reflect or act on it as I need to. If I don't write it down, it's not actionable for me, so I try and be consistent about that.

Celisa Steele: [00:28:09] We've covered a fair amount of ground in our conversation today. If you were to be able to point listeners to one, two, or three points that you really hope they take away from our conversation, what would you highlight?

Lauren Brechner: [00:28:26] We talked a lot about the logistics of a portfolio audit and its benefits, but I think the most important takeaway about that is it's a huge undertaking, and I don't want to undersell that. If you're feeling overwhelmed about where to start, zoom out. Ask, "Which course or offering best represents who we are as an organization and what we're trying to accomplish?" Find that one course, find maybe three courses—even if you want to go that far—and narrow your focus there. Forget the rest of the portfolio for now. You don't even need to put them in a spreadsheet. You can identify that course on what you know about your industry, members, clients, customers. Form that hypothesis, put it out for low-stakes testing, make some updates, and get some feedback, and then you're on your way to making improvements that are actually backed by data. The other point we just talked about—learning offerings can take many forms. Learning happens everywhere all the time, but microlearning is even a way of doing this. You don't have to have your huge on-your-LMS portfolio.

Lauren Brechner: [00:29:33] Taking into practice some of the things I learned from marketing, a drip e-mail campaign that hits folks every two weeks with a little bit of information about a topic they're interested in is a genuinely effective way to fight the forgetting curve when people are cramming so much information, and then they forget it. That is a wonderful, inexpensive, low-touch way of helping extend learning over time. So, if someone took a course online and you want to extend that learning, maybe they get dropped into a drip campaign that continues to reiterate those points over a year. We can also have a PDF with a video. A page with a PDF and a video is another very accessible way to do something. I believe in interactive learning, and it has a lot of impact on retention. But, if that's feeling daunting, don't over-engineer it. Get your best content out there in a way that feels deliverable, but make sure you're measuring the results. If you don't have an LMS, and you just have a Web site, you can have a Web page with some of these courses, with PDFs and accompanying videos. Just start somewhere. Start getting feedback and measuring it. I believe every organization has the capability to share out their unique perspective through learning and provide value.

Jeff Cobb: [00:30:55] That wraps up the conversation with Lauren Brechner, founder and principal consultant at Ember Forge. Stick around for our recap.

Celisa Steele: [00:31:02] You can find show notes and a transcript for this episode at leadinglearning.com/episode488, along with links to the Ember Forge site and Lauren's LinkedIn profile. And if you found this episode valuable, we'd be grateful if you'd share it so that more people can find the show and benefit from the Leading Learning Podcast.

Jeff Cobb: [00:31:21] One thing I'd like to underline from the conversation is Lauren's perspective that a product can deliver multiple benefits but has to solve one primary problem. And getting clear on what that primary problem is will allow a learning business to honestly assess a product's performance.

Celisa Steele: [00:31:38] I also appreciate that she admitted that doing a portfolio audit can feel like a daunting task, but don't let the size of the task stop you. Zoom out, pick the few courses that best represent who you are and what you're trying to accomplish, and start with those rather than trying to inventory everything at once.

Jeff Cobb: [00:31:56] And Lauren's idea that a portfolio audit can double as a pressure test of strategy is worth repeating. Ask whether your offerings actually reflect what you say your mission and vision are, and, if not, decide whether to shift your portfolio or your mission and vision.

Celisa Steele: [00:32:13] Thanks again for listening—and see you next time on the Leading Learning Podcast.

[music for this episode by Moarn]