

THE MEETINGS COACH»

# AUDIT SECRETS:

## Leveraging Your Inner Entrepreneurial Spirit

**Q:** I'm feeling pressure from my organization to conduct a learning audit. Will it really benefit my organization? And what does it involve?

**A:** A learning audit is a systematic review of either a stand-alone program or an entire meetings portfolio to determine its strengths and weaknesses, with the aim of guiding subsequent improvements. Outcomes can include a stronger brand, an elevated reputation and more loyal participation.

The most successful businesspeople approach their work with intentionality. Following are seven entrepreneurial secrets, as originally imagined by Peter Economy for Inc.com, with a learning-audit spin.

**#1:** Build a solid relationship bridge. Identify key stakeholders who are affected by learning programs in your organization. Develop, implement and monitor a communication plan that ensures their buy-in and engagement.

**#2:** Slow down to lead. Carefully identify the three buckets that comprise your learning portfolio: in-person programs, digital programs and other resources that have the potential to educate your audience (e.g., blogs, newsletters, websites, magazines).

**#3:** Choose your mindset. A big-picture audit identifies for each of your three buckets the overall mix, trends and relationship to your organization's body of knowledge. A detailed audit drills down to measure the attainment of established outcomes for each program.

**#4:** Know your business "health" metrics. Gather program metrics via in-person interviews or focus groups and aggregate evaluation or survey data and environmental scanning exercises. Be prepared to make corrections as necessary.

**#5:** Be determined. Stay the course by customizing the standard audit tools and processes, enlisting the support of your professional network (e.g., a colleague with learning audit experience) or seeking the advice of a trusted consultant.

**#6:** Resolve to succeed. Develop a report according to stakeholder needs and wants—either written or verbal (or both). In crafting the report, carefully consider the length, the language used and whether or not to include the raw data.

**#7:** Be prepared to swim upstream. At this stage it's time to implement new ideas and recommendations and to sunset underperforming or mature programs, products and services. While it won't be easy, it's necessary for long-term growth.



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**HAVE A MEETINGS DILEMMA YOU NEED HELP SOLVING?**

Email your questions to Coach Aaron at [aaron@eventgarde.com](mailto:aaron@eventgarde.com); please write "Meetings Mag" in the subject line.