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The SOAP model for learning strategy

A strategic design framework that translates business challenges into learning strategies with measurable outcomes

Every L&D leader we work with is trying to connect learning to business outcomes.

Most have the intent. What's often missing is a structured way to get from intent to evidence.

When we looked at the data from over 100 learning leaders who completed the WeLearn Learning Strategy Scorecard, one finding stood out above everything else: organizations with a formal, documented learning strategy scored 25 points higher than those without one. The difference showed up in every dimension — alignment, governance, measurement, content, technology, and culture.

But having a strategy isn't the same as having a process for building one. Most teams know what they want to achieve. The gap is in how they get from business context to a strategy that holds up — one that's grounded in real constraints, tied to measurable outcomes, and built to prove its value.

WeLearn's SOAP Model for Learning Strategy is a practical framework for closing that gap. Four phases, in a specific order, that help you and your team translate what the business needs into a learning strategy with clear objectives, a deliberate approach, and defined performance outcomes.

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Situation

What is actually happening in the business that requires a learning response?

A rigorous assessment of business context, performance environment, and organizational conditions that create the need for a learning strategy. Grounds the entire strategy in reality.

Objectives

What capabilities must change, for whom, and to what standard?

Translation of business needs into specific, measurable capability and behavioral outcomes. Not learning objectives — strategic outcomes that describe what people must do differently.

Performance

Did the strategy work? Did capabilities develop? Did business outcomes improve?

Systematic measurement of whether the strategy achieved its intended outcomes — capability development and business impact — closing the loop between intent and results.

Approach

What is the most effective strategy for building the required capabilities?

The deliberate design of the learning and enablement strategy: portfolio decisions, modality choices, sequencing, operating model, resource requirements, and risk identification.

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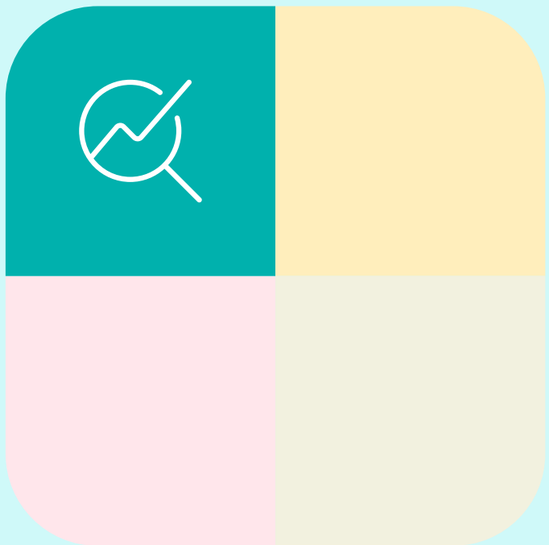
Phase definitions

What each phase requires, what questions it answers, and what it produces for the teams building the strategy and the stakeholders it serves.



Situation

A rigorous assessment of the business context, performance environment, and organizational conditions that create the need for a learning strategy.

The Situation phase grounds the entire strategy in reality by articulating what is happening in the business, why it matters, and what forces are shaping the demand for learning and capability development.

SCOPE OF INQUIRY

- Business strategy and direction
- Workforce composition and dynamics
- Current learning landscape
- Organizational constraints (budget, technology, culture)
- Stakeholder expectations
- External pressures (regulatory, competitive, technological)

PHASE OUTPUTS

Situation Summary **Stakeholder Map** **Constraint Register** **Opportunity Landscape**

COMMON MISTAKE

Skipping or rushing because the team believes they already understand the business context. Assumptions made here compound throughout the strategy.

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Objectives

The translation of business needs into specific, measurable capability and behavioral outcomes that the learning strategy must achieve.

These are not learning objectives in the instructional design sense — they are strategic outcomes that describe what people must be able to do differently, and to what standard, for the business to achieve its goals.

SCOPE OF INQUIRY

- Capability gap analysis
- Priority populations (roles, functions, levels)
- Behavioral specificity
- Outcome framing in business terms
- Time horizons (immediate vs. long-term)
- Sequential vs. parallel dependencies

PHASE OUTPUTS

Scope Boundaries **Capability Priority Matrix** **Success Criteria** **Strategic Objective Statements**

COMMON MISTAKE

Writing objectives that describe learning activities rather than business outcomes. If an objective starts with "deliver," "launch," or "provide," it is probably an activity, not an outcome.

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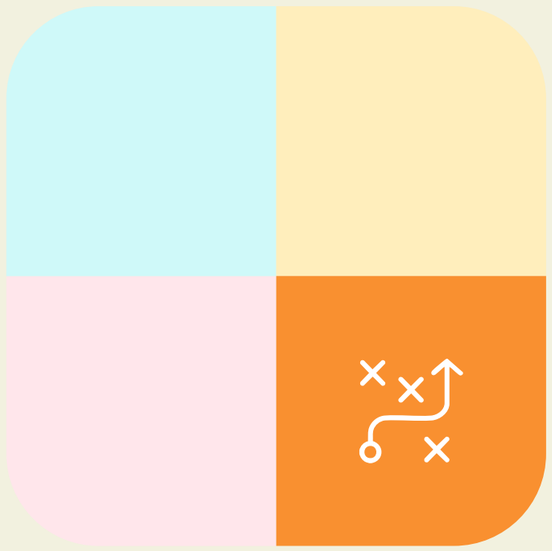

Approach

The deliberate design of the learning and enablement strategy that will achieve the stated objectives within the constraints identified in the Situation.

This is where strategic choices are made about how to build capability: what interventions to use, how to sequence them, what operating model to adopt, and what resources are required.

SCOPE OF INQUIRY

- Learning portfolio design (formal, informal experiential, social)
- Modality and channel decisions
- Sequencing and phasing
- Operating model implications
- Technology and platform strategy
- Resource requirements
- Change management
- Risk identification

PHASE OUTPUTS

Strategy Blueprint **Operating Model** **Technology Roadmap**

Implementation Timeline **Investment Case**

COMMON MISTAKE

Jumping to solutions before the Situation and Objectives are validated. If the Approach was decided before SOAP began, the process is being used as window dressing.

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Performance

The systematic measurement of whether the learning strategy achieved its intended outcomes, both in terms of capability development and business impact.

The Performance phase closes the loop between strategic intent and actual results, providing the evidence needed to sustain investment, refine the approach, and demonstrate value.

SCOPE OF INQUIRY

- Leading indicators (engagement, completion, knowledge)
- Capability metrics (skill assessment, practical application)
- Business impact metrics (productivity, quality, revenue, retention)
- Efficiency metrics (cost-effectiveness, ROI)
- Stakeholder perception
- Continuous improvement signals

PHASE OUTPUTS

Measurement Framework **Baseline Documentation** **Performance Dashboard**

Impact Report **Refinement Recommendations**

COMMON MISTAKE

Measuring only what is easy (completions, satisfaction) rather than what matters (capability change, business outcomes). The measurement plan must be designed alongside the Objectives, not as an afterthought.

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We believe learning is
human — and we build it that way.

WeLearn is a learning services, consulting, and custom content partner. We work alongside you to create solutions grounded in strategy, shaped by culture, and designed for real behavior change.

Based in Chicago, WeLearn serves global corporations including Fortune 500 companies.

Learn more at: www.welearnls.com