

PARTNER POSITIONING WORKSHEET

A 5-part check for L&D and enablement teams to see whether you're operating as an order-taker or a strategic partner, and where to start closing the gap.

“Be more strategic” isn’t an action

It’s a wish without a mechanism behind it. Most teams don’t end up taking orders because they lack skill. It’s the buildup of small habits: saying yes to everything, reporting on activity instead of outcomes, getting looped in after the decision’s already made. This audit turns that into five checks you can run this week.

01. Audit your last 10 requests

How many arrived as a solution (“build training”) versus a problem (“reps are missing quota”)? A high solutions-in ratio means you’re being handed tactics, not invited into strategy.

Solutions-in: _____ / 10 Problems-in: _____ / 10

02. Audit your reporting language

Pull your last 3 reports to leadership. Count activity-based metrics (completions, attendance, satisfaction) versus outcome-based metrics (time-to-competency, error rate, retention, revenue).

Activity metrics: _____ Outcome metrics: _____

03. Map your intake timing

For your last 3 projects, note when your team was looped in relative to when the tool or process decision was made. Early input signals partnership. After-the-fact input signals order-taking.

Project 1: _____ Project 2: _____ Project 3: _____

04. Pick one relationship to build

Who outside L&D — Finance, Ops, a business unit lead — could help you understand how leadership actually talks about budget and results? Name one person and set the first conversation.

Person: _____ **First meeting date:** _____

05. Pick one live request to reframe

Next time something lands on your desk as “we need training,” ask the business question underneath it before scoping anything.

Request: _____

Business question asked: _____

What your answers tell you

Mostly order-taker: Requests arrive as finished solutions, reporting is activity-based, and input comes after decisions are made. Start with step 5 — reframe one request this week.

Somewhere in between: You have pockets of early input or outcome reporting, but it's inconsistent. Start with step 4 — the relationship you build determines how early you get looped in next time.

Mostly strategic partner: Requests already arrive as business problems and your reporting maps to leadership's metrics. Use this audit quarterly to make sure the pattern holds as your org changes.

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