



Upskilling Playbook:
Implementation

UpSkill America at the Aspen Institute

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Abstract

The *Upskilling Playbook* is a strategic guide for organizations to build, scale, and integrate skills-based workforce development initiatives that drive business performance and career growth. Despite rapid economic and technological shifts making upskilling a business imperative, many efforts struggle to gain traction and become embedded in business strategy.

This playbook cuts through the noise while preserving the depth needed to drive real change – integrating corporate best practices, academic research, and practical application. It helps organizations amplify the impact of existing initiatives or launch new efforts with clarity and measurable results. It provides a practical framework for navigating challenges, capitalizing on opportunities, and implementing upskilling at scale. Covering key areas such as workforce ecosystem development, program design, measurement strategies, and leadership alignment, it delivers actionable insights for HR professionals, business leaders, and decision-makers.

When organizations fully embed upskilling into their talent and business strategy, they create sustainable talent pipelines, improve retention, and future-proof their workforce against industry shifts and technological advancements.

What's at Stake

Just as a business strategy is only as effective as its execution, the long-term success of an upskilling initiative depends on how well it is implemented. This is where strategy takes shape—where a well-designed plan becomes action. Done well, implementation builds internal alignment, ensures a seamless participant experience, and drives measurable impact for both employees and the organization.

For some, this chapter will serve as a guide to moving from upskilling strategy to execution. For others, it may provide a roadmap for optimizing an existing initiative they've inherited. Whether launching a new program or refining one already in motion, understanding the key aspects of implementation is critical. Strong execution isn't just about getting started—it's about continuously adapting to ensure upskilling delivers lasting impact.

Upskilling isn't just a workforce trend—it's a business imperative. However, even companies that recognize its value often struggle with execution. The key to success lies in embedding upskilling into daily operations, leadership priorities, and broader talent strategy so that learning directly supports business outcomes.

Companies that get implementation right gain a competitive advantage. Effective upskilling increases workforce agility, strengthens talent pipelines, and enhances employee engagement by providing clear career pathways. When upskilling is integrated, data-driven, and aligned with workforce needs, organizations don't just fill skill gaps—they build a workforce capable of adapting to change, driving innovation, and sustaining long-term business success.

Stat: According to i4cp, organizations that link upskilling to internal mobility and leadership buy-in achieve 2 times the market performance of their peers.

The Problem Today

Many companies recognize the importance of upskilling but struggle to scale their efforts beyond isolated programs. Without a clear execution strategy, upskilling remains fragmented—detached from business priorities, workforce planning, and leadership support. Instead of fueling long-term talent development, it often becomes a disconnected initiative with minimal impact. Key challenges include:

- **Lack of strategic integration** - Upskilling efforts often operate in silos rather than being embedded into talent and business strategies.
- **Failure to align with business needs** - Programs that do not directly address workforce gaps and future skill demands struggle to gain traction.
- **Unrealistic ROI expectations** - From the start of implementation, upskilling must be positioned as a strategic initiative that builds value and delivers ROI over time.
- **Limited leadership buy-in** - Without visible executive support, upskilling is often deprioritized, limiting its ability to scale.
- **Inability to measure impact** - Many companies track completion rates but lack the data to demonstrate business value, making it difficult to sustain investment.

The Risks of Poor Implementation

Companies that fail to execute upskilling effectively risk:

- Low participation rates due to unclear purpose and incentives.
- Limited business impact if upskilling is disconnected from workforce planning.
- Employee skepticism if learning does not translate into real career mobility.
- Wasted investment in programs that fail to deliver measurable value.

Personas & Implementation

The Business Leader: Balancing Strategy and Execution

"We know upskilling is critical, but how do we make sure it's actually driving business results? I don't just want more training—I want a workforce that's more agile and capable. How do we ensure this isn't just an HR initiative but something that moves the business forward?"

For many business leaders, upskilling is recognized as an imperative, but implementation can feel disconnected from broader business goals. They need assurance that upskilling efforts align with performance objectives, market shifts, and workforce planning. Key questions they grapple with include:

- How do we ensure upskilling is more than a cost center and instead a business driver?
- How do we track and measure impact beyond training participation?
- What role do leaders play—beyond budget approval—in making this effort a success?

The key to engaging business leaders is clear alignment between upskilling and strategic objectives. Implementation must include:

- 🔗 A structured measurement framework that tracks workforce readiness, productivity, and business impact.
- 🔗 Leadership engagement strategies that empower managers to integrate upskilling into team development.
- 🔗 Cross-functional collaboration to ensure that upskilling initiatives solve real business challenges.

The HR & Talent Leader: Driving Implementation and Overcoming Barriers

"I see the potential of upskilling, but pulling everything together is complex. We need leadership buy-in, the right data, and the ability to show impact over time. How do we create momentum and keep it sustainable?"

HR and talent leaders are often the orchestrators of upskilling efforts, responsible for engaging stakeholders, breaking down silos, and ensuring execution aligns with business priorities. They face challenges like:

- Securing ongoing leadership support beyond initial excitement.
- Navigating data gaps and aligning metrics across HR, finance, and business units.
- Addressing employee skepticism and ensuring participation.
- Embedding upskilling into the culture rather than treating it as a one-off program.

To support successful implementation, talent leaders must:

- 🔗 Build a coalition across HR, operations, and business units to integrate upskilling into workforce planning.
- 🔗 Ensure data and measurement are at the core of implementation, linking upskilling to performance outcomes.
- 🔗 Develop a change leadership strategy to drive adoption and engagement at all levels.

The Solution: A Structured Implementation Framework

Preparing for Implementation: Aligning Strategy with Vision

Successful upskilling implementation begins with a strong foundation built on vision and mission. A clear vision establishes a compelling future state for workforce development, while a well-defined mission provides a structured roadmap for action. These elements do more than guide implementation—they reinforce the broader upskilling ecosystem, ensuring alignment between business needs, employee growth, and long-term workforce strategies.

A well-articulated vision inspires action by giving employees and stakeholders a shared purpose. The mission then translates that vision into concrete steps, ensuring alignment across teams and embedding upskilling within the broader talent strategy.

The Game Plan for Implementation

Effective implementation requires structured planning across five key areas, each playing a critical role in translating strategy into measurable impact.

Program Management





Program management is the engine that drives implementation, ensuring all moving parts work together seamlessly. It involves:

- ✂ **Planning and Coordination** - Structuring the program with clear goals, timelines, and accountability.
- 📌 **Operational Execution** - Managing logistics, resources, and workflows to support a smooth rollout, including collaboration with internal and external partners.
- ⚠ **Risk Management** - Identifying potential challenges and proactively addressing roadblocks.
- 🔄 **Continuous Improvement** - Iterating on processes based on feedback and performance data.

A well-run program management function keeps upskilling initiatives on track, scalable, and adaptable to evolving business needs.

Data & Insights

Data serves as the foundation for decision-making throughout the implementation process. It helps organizations:

-  **Understand workforce needs** - Identify skill gaps, talent shortages, and business priorities.
-  **Measure program effectiveness** - Prepare to track participation, learning outcomes, and career mobility.
-  **Inform strategic adjustments** - Leverage insights to refine content, optimize delivery, and maximize impact.
-  **Demonstrate ROI** - Align upskilling outcomes with key business performance metrics.

By integrating employee feedback, workforce analytics, and external labor market trends, organizations ensure that upskilling efforts are data-driven, relevant, and impactful.

Communication & Engaging Others

A strong communication strategy ensures that employees and leaders understand the value of upskilling, recognize its benefits, and feel motivated to participate. Beyond simply sharing information, effective communication drives engagement, builds advocacy, and fosters a culture of learning.

-  **Organizational Messaging** - Company-wide announcements, town halls, and internal campaigns to establish visibility and importance.
-  **Targeted Engagement** - Leadership forums, department meetings, and small-group discussions to address concerns and encourage participation.
-  **Ongoing Feedback Loops** - Surveys, focus groups, and open communication channels to gather employee insights and improve the program.
-  **Leadership Advocacy** - Leaders sharing their own upskilling experiences, reinforcing that continuous learning is a business priority.
-  **C-Suite Endorsement** - Senior executives publicly championing upskilling to signal its strategic importance.

A well-executed communication plan ensures that upskilling is not seen as an optional initiative, but rather a key driver of business and career success.

✦ Case Study: Adapting Upskilling Programs to Market Shifts

Lee Health faced a growing workforce challenge—rising patient care demands, a shortage of skilled nurses, and an evolving healthcare landscape that required new skills. In response, the company launched a “Virtual Nursing” program, upskilling experienced nurses for remote, telehealth-driven roles. This initiative was designed to ensure that nurses could continue to provide high-quality care while alleviating the burden on frontline staff.

The upskilling program combined telehealth certifications, AI-driven workflow management training, and digital literacy modules to prepare nurses for virtual patient interactions. The company worked closely with healthcare technology experts to design a curriculum that mirrored real-world telehealth environments, ensuring that nurses gained practical experience in remote patient monitoring, digital documentation, and virtual care coordination.

As a result, nurses transitioned seamlessly into telehealth roles, improving both operational efficiency and patient outcomes. The program also led to higher nurse retention, as experienced staff were able to extend their careers in flexible remote roles. By building a talent pipeline for future healthcare delivery models, Lee Health established itself as a leader in workforce innovation.

Governance: Ensuring Long-Term Success

Governance structures provide the oversight and accountability necessary to sustain upskilling efforts. They ensure programs remain aligned with business strategy, receive long-term investment, and evolve with workforce needs.

Group	Purpose
Steering Committee	Oversees strategic direction, secures leadership alignment, and ensures upskilling drives both workforce and business impact.
HR & Business Leaders	Integrates upskilling into workforce planning, talent strategy, and operational needs.
External Partners	Provides insights into industry best practices and emerging skill trends to keep programs forward-thinking.

Governance is more than oversight—it’s a structured way to measure success, refine strategy, and drive talent outcomes over time. Conversations that involve sharing data, success stories, and challenges help build leadership alignment and ensure continued support.

To Build Effective Governance:

- Identify executive sponsors to champion the initiative.
- Form a cross-functional team including HR, finance, and business leaders.
- Define key success metrics and assign accountability for tracking them.
- Schedule quarterly governance meetings to assess progress and make strategic adjustments.

A well-structured governance framework ensures that upskilling remains a long-term priority, rather than a short-term initiative.

✦ **Case Study: Stakeholder Engagement & Strategic Alignment - Major Entertainment and Media Company**

Through the launch of a fully funded education benefit exclusively for its hourly employees—and grounded in the belief that learning access should be embedded in the employee experience, not gated by cost, scheduling, or perceived eligibility restrictions—a major entertainment and media company recognized that scale would require more than a great program design. It would require active and ongoing engagement across stakeholders at every level of the organization.

Key functions across HR, legal, finance, operations, technology, and communications departments were engaged from the outset of design and planning. Executive sponsors championed the program as a business priority that should be taken seriously. Operations leaders provided critical insights that helped shape policies and processes to minimize friction for frontline teams. The team invested in understanding the needs and aspirations of the hourly population, while the communications department ensured a consistent narrative that resonated across geographies, business units, and job types. This cross-functional alignment was essential not only to launching the program but to sustaining its growth and relevance over several years.

The program was supported by robust internal feedback loops that ensured stakeholder voices—especially those closest to the employee experience—were integrated into decision-making. The learning catalog was regularly adapted based on insights from managers and workforce data. Leaders at all levels were equipped with talking points, dashboards, and tools to support employees and reinforce the opportunity the program represented. Active conversations were held with participants, leaders, and executives to hear firsthand about successes and challenges. As a result, the program was not seen as a transactional benefit, but a powerful component of a company-wide culture of opportunity and growth.





By investing in stakeholder engagement as a core design principle, the company built a talent development platform that earned trust, delivered results, and remained deeply

aligned to both workforce needs and business strategy. The program proved that large-scale learning doesn't succeed by mandate—it succeeds through collaboration.

Planning for Change

Upskilling implementation is not just about program design—it's also about navigating change. Even the most well-designed initiatives can face resistance or misalignment if employees, managers, and business leaders are not actively engaged.

Key Considerations for Change Management:

-  Anticipating Resistance - Identifying potential concerns and proactively addressing them.
-  Embedding Upskilling in Culture - Making continuous learning a visible and valued part of organizational DNA.
-  Supporting Leaders - Equipping managers with the tools to champion upskilling within their teams.
-  Iterating Based on Feedback - Adapting approaches as employee needs, business priorities, and workforce trends evolve.

By treating implementation as a continuous process rather than a one-time rollout, organizations can ensure that upskilling becomes a lasting driver of workforce resilience and business success.

Worksheet

Step 1: Secure Leadership Commitment

✦ Why? Without executive sponsorship, upskilling remains an HR initiative rather than a business priority.

✓ Identify leaders who need to be involved, considering both leaders with functional responsibilities as well as those with tacit influence.

✓ Begin outlining the business case linking upskilling to cost savings, retention, and business performance.

✓ Have leaders actively promote upskilling in meetings and employee communications.

✓ Actively share the story of what is being created, including data-driven examples (e.g. hiring costs vs. upskilling investment) and people-centered impacts.

Step 2: Align Internal Stakeholders

✦ Why? HR, finance, and business Units must be aligned to ensure funding, integration, and long-term execution.

✓ Conduct a stakeholder mapping exercise to define roles.

✓ Organize cross-functional discussions to align on upskilling priorities.

✓ Create a shared accountability plan outlining key responsibilities.

Step 3: Define Upskilling Priorities & Scope

✦ Why? Many companies fail by trying to tackle too many skills at once. Prioritize high-impact, business-critical skills.

- ✓ Identify skills gaps based on workforce trends.
- ✓ Choose 2-3 priority areas (e.g. digital skills, leadership development).
- ✓ Select the right upskilling models (see Types of Upskilling chapter).
- ✓ Map career pathways that align upskilling with internal mobility.

Step 4: Launch Pilot Programs

✦ Why? Pilots allow organizations to test and refine before scaling.

- ✓ Select a pilot group based on skills gaps.
- ✓ Establish success metrics for pilot.
- ✓ Conduct a mid-pilot review and adjust based on feedback.
- ✓ Develop hypotheses related to long-term impact to be created when scaled.

Step 5: Scale & Integrate into Workforce Strategy

✦ Why? To move beyond a one-off initiative, upskilling must be embedded into hiring, job design, and performance management.

- ✓ Identify additional areas based on skill and workforce needs.

- ✓ Build internal talent pipelines from participants to connect learning to career progression (see Spotlight below).

- ✓ Track findings related to hypotheses and share metrics and progress.

- ✓ Integrate upskilling into HR processes & leadership development.

Step 6: Measure & Optimize

✦ Why? Tracking impact ensures upskilling delivers measurable business value.

- ✓ Shift from training completion metrics to business outcomes.

- ✓ Track internal mobility, cost savings, retention impact.

- ✓ Use HR analytics and skills tracking platforms to refine programs.

- ✓ Showcase employee success stories to reinforce culture change.

Spotlight: Building Internal Pipelines

If there's one practice that has the power to unlock talent, strengthen retention, and cut hiring costs all at once, it's building internal pipelines. And yet, it remains one of the hardest things for organizations to get right. Here's why—and what to do about it.

Building internal pipelines is often a new approach and runs headfirst into legacy structures, rigid job descriptions, existing practices, and outdated mindsets. Internal mobility is often discussed but rarely designed with the level of intention needed to break through these barriers. Leaders hesitate to release top talent, employees struggle to see clear career paths, and organizations default to external hiring rather than investing in their own people.

How do you fix this? It starts with three key shifts:

1. **Make career pathways visible and real.** Move beyond generic models—show employees exactly how skills development connects to future roles and internal opportunities. Visibility and transparency generate energy, build interest, and spark involvement. This helps leaders see potential in their people and start to undo legacy ways of working.
2. **Use technology as an enabler, not a barrier.** Outdated systems can make internal mobility more difficult than hiring externally. Newer platforms, despite their promise, often become so complex that they overwhelm rather than empower users. The key is to ensure technology removes friction rather than adding to it. Leverage internal talent marketplaces, AI-driven skills tracking, or digital career mapping tools that make it easier for employees to find and act on opportunities.
3. **Make mobility a constant conversation.** Internal movement can't be an afterthought. The more leaders talk about it, the more examples they generate, and the more it becomes a natural part of talent strategy. Make it a standing agenda item in team meetings, performance conversations, and leadership discussions, so mobility shifts from an exception to an expectation.








Internal talent pipelines don't build themselves. But with the right intent, structure, and leadership commitment, they become one of the most effective ways to future-proof your workforce and drive business success.

Ongoing Implementation: Building Understanding

As you move beyond initial implementation, it's critical to build on the energy and alignment across all stakeholders and partners. The motivation to start an upskilling effort may come from different leaders or teams. A business leader may see the need to build specific skills within their team, while a CHRO may focus on broader benefits like talent acquisition, turnover reduction, and internal mobility. Each stakeholder brings a unique perspective, and their sense of urgency may vary.

Gaining clear insights from those sponsoring the effort helps establish a shared understanding of why the initiative matters, the value it is expected to deliver, and how success will be measured. These insights serve as a foundation for effective messaging, program design, and long-term engagement.

Stakeholder input also helps identify potential gaps or misalignment before they become barriers to success. Learning from target employees, understanding workforce challenges, and considering the broader organizational landscape ensures that upskilling efforts are both relevant and impactful. This involves gathering insights from employees, analyzing business and workforce data, and engaging leadership in shaping the approach. Key insights to gather include:

-  **Program Perceptions** - Survey employees to assess awareness, interest, motivators, and barriers. Conducting this early informs program design and communication strategies.
-  **Employee Data** - Workforce metrics such as retention, productivity, workforce mix, future skill needs, and engagement levels.
-  **Recruiting Data** - Insights into talent acquisition trends and roles where upskilling can reduce hiring gaps in both the short and long terms.
-  **Leader Perspective** - Challenges and benefits leaders associate with upskilling efforts, and their views on skill gaps within their teams.
-  **Macro Data** - Demographic and societal data related to workforce trends and potential talent pools.
-  **External Education** - Feedback from students and educators, as well as ongoing insight into relevant topics and education programs that address evolving business needs.
-  **External Partners** - If using an outside vendor, ensuring seamless integration of processes and data with internal systems.

Each of these components helps shape a data-informed approach to upskilling, ensuring that decisions are based on real workforce needs rather than assumptions.

Navigating Implementation Challenges

Every meaningful change comes with challenges—some expected, others unpredictable. The key isn't to avoid them but to navigate them with intention. Upskilling is more than an HR initiative; it's a business strategy that requires adaptability, leadership commitment, and a focus on long-term impact. The obstacles below aren't roadblocks; they're realities of the work. Knowing what to expect—and how to respond—turns challenges into momentum.

Common Challenges & Solutions

- ◆ If there is a lack of leadership buy-in → Align upskilling with business goals and use data-driven storytelling to demonstrate ROI. Ensure use of leaders' language aligned to their priorities.
- ◆ If the business impact is unclear → Shift from tracking participation to measuring internal mobility, retention, and cost savings.
- ◆ If employees are skeptical → Show clear career pathways and real success stories to reinforce the value of upskilling.
- ◆ If HR efforts are siloed → Integrate upskilling with job design, internal mobility, and workforce planning for long-term impact.
- ◆ If there is a culture of short-term thinking → Encourage leaders to plan beyond immediate hiring needs, focusing on workforce resilience.
- ◆ If there are resource constraints → Treat upskilling as an investment, leveraging technology and external partnerships to maximize available funding from both public and private resources.
- ◆ If there are competing priorities → Position upskilling as a strategic enabler that supports transformation efforts, not as an isolated HR program.




Looking Ahead

Building Momentum & Sustaining Impact





The launch of an upskilling initiative is just the beginning. Long-term success depends on continuous improvement, leadership advocacy, and strategic adaptability. To truly embed upskilling into workforce development, organizations must go beyond a one-time effort and integrate it into business strategy and planning.

Successful upskilling implementation is not just about launching programs—it requires shifting organizational mindsets and embedding learning into the fabric of work. Many companies still operate within legacy talent structures, where hiring and employee development are treated as separate functions. However, the future of work demands integration—where workforce development is not a side initiative but a strategic enabler of business growth.

Leading change means:

-  Breaking down silos between HR, learning, and business functions.
-  Fostering alignment across talent acquisition, workforce planning, and leadership development.
-  Positioning leaders as enablers of workforce mobility and skill building.

Sustaining impact requires ongoing refinement, alignment with workforce needs, and a commitment to real outcomes. To ensure long-term success:

-  **Revisit program goals regularly** - Assess progress, track workforce shifts, and refine strategy to align with evolving business needs.
-  **Showcase success stories** - Amplify employee career growth, mobility, and development wins to reinforce value and inspire engagement.
-  **Expand participation strategically** - Identify new workforce segments and emerging skill gaps that upskilling can address.
-  **Use data-driven iteration** - Actively gather and analyze employee and business feedback to fine-tune learning pathways and workforce impact.

Upskilling isn't just about training—it's about shaping a future-ready workforce. Companies that commit to continuous learning and adaptability will build lasting competitive advantage and a culture where employees and businesses thrive together.

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