



Measuring Strategic, Visible and Costly Learning Programs

Jeffrey Berk
Chief Operating Officer

Agenda

- Review the importance of measuring strategic, visible and costly programs
- Discuss the measurement plan to gather timely, credible data
- Showcase sample reports, statements, dashboards and scorecards

About KnowledgeAdvisors

Best Practice

Cloud Computing

Integrated Reporting

Informal and Social Learning Measurement

Benchmarking



Some of Our Clients



A Program with an Unhappy Ending

1. Company A went back 2 years... and identified that they had **1,019 people rated #3**, “needs improvement” in recent performance reviews
2. They calculated that they **spent an average of \$13,090 per year** on highly visible performance management (Coaching, counseling, mentoring, retraining and manager time) to elevate them to #1's , “high performers”
3. They identified 2 years later... the number that were currently ranked as #1's, was **ZERO**

Source: Dr. John Sullivan, Presentation at Analytics Symposium

When Do I Need to Measure?

For any L&D program, ask the following questions:

- ✓ Is it **Strategic**?...aligned to an executive initiative
- ✓ Is it **Visible**?...awareness by senior management
- ✓ Is it **Costly**?...more money than a typical program



Strategic, Visible, Costly Programs

- Leadership Development
- On-boarding/ New Hire
- Sales Training
- Others?



Measurement Plan 'Top 10'

1. Identify Key Performance Indicators
2. Create Smart Sheet Evaluations
3. Build Communication Plan
4. Design the Dashboard
5. Provide Executive Reports, Scorecards, and Statements
6. Conduct Capability Assessment
7. Perform a Test/Certification
8. Gather Sponsor Satisfaction Data
9. Deploy On-the-Job Reinforcement
10. Conduct Business Impact Exercise

Identify Key Performance Indicators



Outcome Metrics - Business Outcomes

- Leader Retention (Leadership)
- Time to Performance (On-boarding)
- Win Rate (Sales)

Effectiveness Metrics – Program Performance

- Delivery Quality
- Knowledge Gain
- Application to Job
- Business Alignment
- Value

Efficiency Metrics – Cost and Activity

- # of Participants
- % of Employees Trained
- Total L&D Investment
- L&D Investment per Participant
- Courses Utilized
- Classes Conducted
- Instructors Utilized
- Locations Used

Create 'Smart Sheet Evaluations'

Level 1 Reaction

Level 2 Learning

Level 3 Job Impact

Level 4 Results

Level 4 Results

MGMT Support

Level 5 ROI/ROE

Evidence of Success

Not only evaluate The training but also the process such as on-boarding or leadership development or sales effectiveness

Post Event Evaluation – Instructor Led Training

Please help us improve our training programs by responding to this survey.

Email Address _____

INSTRUCTOR

Strongly Disagree Strongly Agree

1. The instructor was knowledgeable about the subject. 1 2 3 4 5 6 7 n/a

2. The instructor's energy and enthusiasm kept the participants actively engaged. 1 2 3 4 5 6 7 n/a

ENVIRONMENT

Strongly Disagree Strongly Agree

3. The physical environment was conducive to learning. 1 2 3 4 5 6 7 n/a

COURSEWARE

Strongly Disagree Strongly Agree

4. The scope of the material was appropriate to meet my needs. 1 2 3 4 5 6 7 n/a

5. The examples presented helped me understand the content. 1 2 3 4 5 6 7 n/a

LEARNING EFFECTIVENESS

Strongly Disagree Strongly Agree

6. I learned new knowledge and skills from this training. 1 2 3 4 5 6 7 n/a

JOB IMPACT

Strongly Disagree Strongly Agree

7. I will be able to apply the knowledge and skills learned in this class to my job. 1 2 3 4 5 6 7 n/a

8. What percent of your total work time requires the knowledge and skills presented in this training? Check only one.
 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

9. What percent of new knowledge and skills learned from this training do you estimate you will directly apply to your job?
 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

BUSINESS RESULTS

Strongly Disagree Strongly Agree

10. This training will improve my job performance. 1 2 3 4 5 6 7 n/a

11. Given all factors, including this training, estimate how much your job performance related to the course subject matter will improve.
 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

12. Based on your response to the prior question, estimate how much of the improvement will be a direct result of this training.
 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

©2008 KnowledgeAdvisors. All rights reserved.

BUSINESS RESULTS (Continued)

13. This training will have a significant impact on: (check all that apply)
 increasing quality increasing productivity increasing employee satisfaction
 decreasing costs increasing sales increasing customer satisfaction
 decreasing cycle time decreasing risk.

SUPPORT TOOLS

Strongly Disagree Strongly Agree

14. The participant materials (manual, presentation handouts, etc.) will be useful on the job. 1 2 3 4 5 6 7 n/a

15. My manager and I set expectations for this learning prior to attending this training. 1 2 3 4 5 6 7 n/a

16. After training, my manager and I will discuss how I will use the learning on my job. 1 2 3 4 5 6 7 n/a

17. I will be provided adequate resources (time, money, equipment) to successfully apply this training on my job. 1 2 3 4 5 6 7 n/a

RETURN ON INVESTMENT

Strongly Disagree Strongly Agree

18. This training was a worthwhile investment in my career development. 1 2 3 4 5 6 7 n/a

19. What about this class was **most** useful to you?

20. What about this class was **least** useful to you?

21. How can we improve the training to make it more relevant to your job?

22. If you feel you will be successful in applying this learning please provide a few tangible examples of how you will apply it.

Build Communication Plan

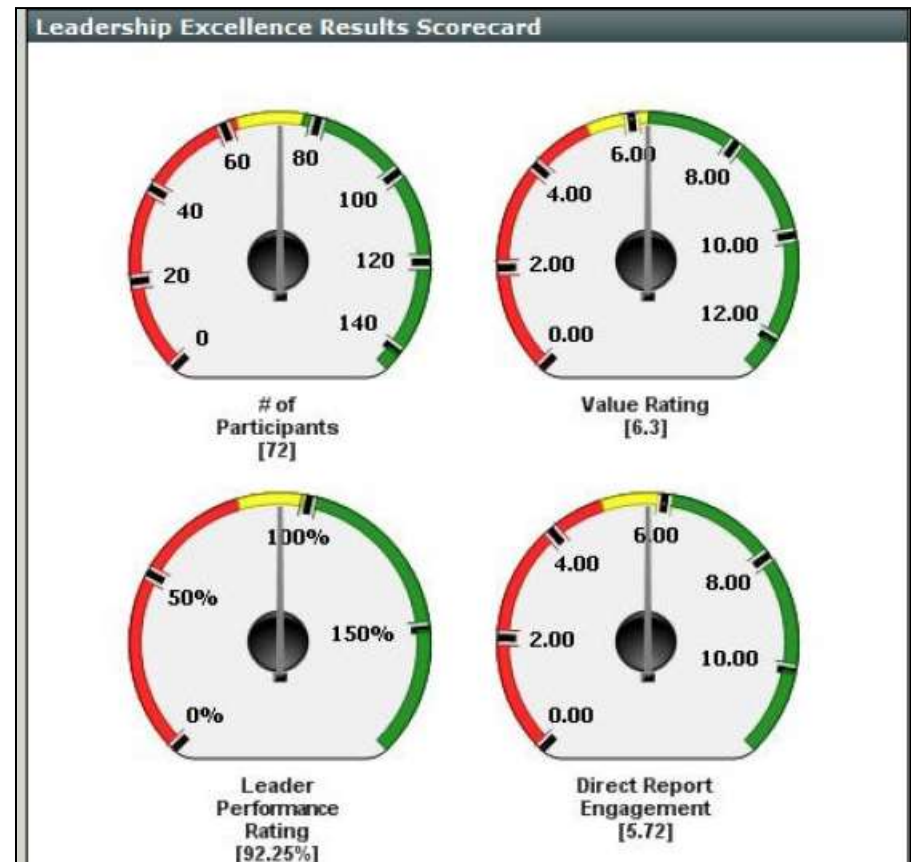
A communication plan is a document that can be distributed to participants and sponsors that outline the context for measuring the program as well as what, when and how measurement will be done.

This helps with change management and project management.



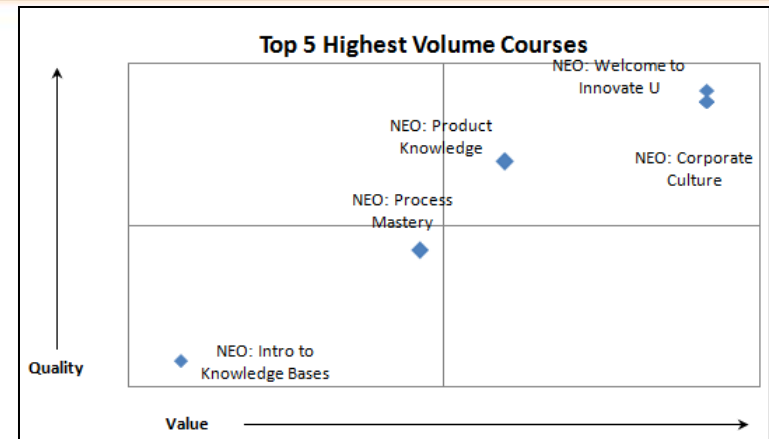
Design the Dashboard

- A visual, concise data representation
- Shows the efficiency, effectiveness and outcome metrics
- Data from evaluations, tests, assessments imports, LMS / HRIS feeds, uploads, etc.

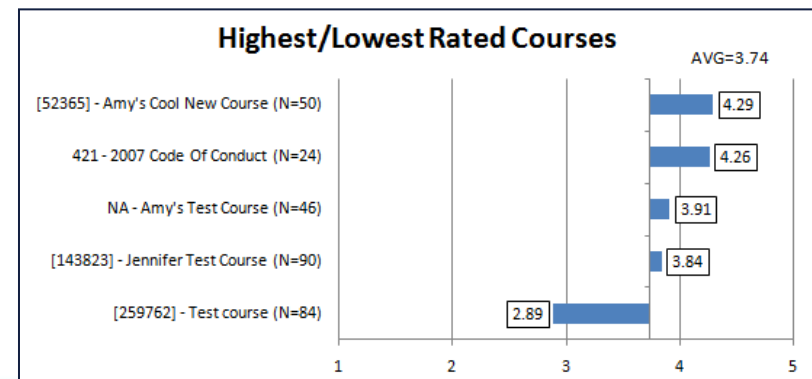


Reports, Scorecards, Statements

- Reporting for a non L&D audience that emphasize efficiency, effectiveness and outcomes.
- Reporting for L&D executives that focus on satisfaction to impact and value
- Hold quarterly reviews with L&D execs and sponsors



Leadership Development	Q1 2010 (N= 115)	Q2 2010 (N= 128)
Business Outcome Rating	74%	74%
Effectiveness Rating	76%	80%
Efficiency Rating	<u>79%</u>	78%



Conduct Capability Assessment

Conduct a 180 or 360 of core competencies to identify blind spots and hidden strengths specific to the desired behaviors participants are to improve

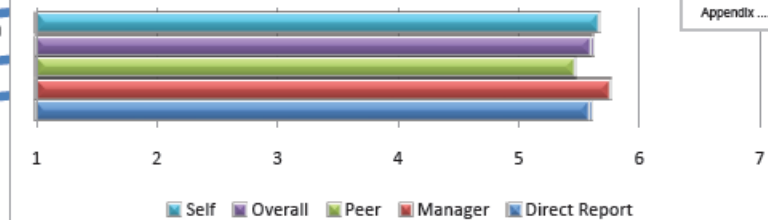
Multi Rater Participant Summary

2010 Leadership
Competency
Assessment

Prepared For: Smith, John

Report Date: 2/10/2010 11:48 AM

Average by Rater Type



Overall Gaps from Self

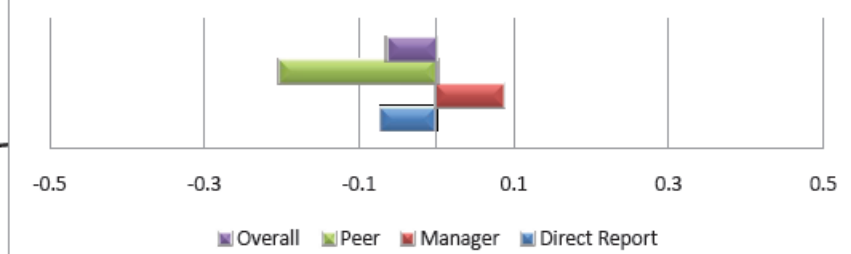


Table of Contents

Overall Ratings.....	3
Competency Ranking.....	5
Qualitative Feedback.....	6
Strengths - Highest Rated Behaviors.....	10
Areas for Improvement - Lowest rated Behaviors.....	12
Hidden Strengths - "Underestimators".....	14
Blind Spots - "Overestimators".....	15
Divergent Opinions - "Managing Up, Managing Well or Just Managing".....	16
Appendix.....	19



Perform Test/Certification

Validate critical knowledge and increase participant confidence with a test.

1. Take Test

2. Receive Feedback

3. Receive Certificate



Food School Post-Test

Which of the following are considered food contact surfaces?

Correct Answer: All of the above
 n-count*: 498
 Skip Count: 1
 Difficulty Index: 1.00
 Item Discrimination Index: 0.16
 Upper/Lower Disc. Index: 0.01
 Distracter Analysis:

0% Cutting boards
 0% *** Skipped Question ***
 0% Prep tables
 0% Slicer

What is the temperature danger zone?

Correct Answer: 41-140 degrees F
 n-count*: 498
 Skip Count: 2
 Difficulty Index: 0.96
 Item Discrimination Index: 0.45
 Upper/Lower Disc. Index: 0.13
 Distracter Analysis:

1% 37-140 degrees F
 1% 60-160 degrees F
 1% 20-120 degrees F
 0% *** Skipped Question ***

Pre Vs Post Test

Run By: training07 training07 (training07)
 Date Run: Jul 19, 2007

MTM Tool: Pre Vs Post Test
 From Saved Query: No

	Pre-Test (n=3)	Post-Test (n=3)	Change
Overall	33.33%	93.33%	60.00%
Additional Questions	33.33%	93.33%	60.00%
Additional Questions	33.33%	93.33%	60.00%
How many key concepts does Six Sigma have?	33.33%	100.00%	66.67%
What does DMAIC stand for?	0.00%	100.00%	100.00%
What does TQM stand for?	33.33%	100.00%	66.67%
Which is a correct methodology?	33.33%	100.00%	66.67%
Which one is a key concept of Six Sigma?	66.67%	66.67%	0.00%

Sponsor Satisfaction Data

Gather feedback from key sponsors at key milestones regarding their overall satisfaction with the program and its outcomes.

1. I have successfully relied on the Leadership Development Program to help me meet my business objectives.
Strongly Disagree Strongly Agree
2. The Leadership Development Program delivered a high quality solution to my employees.
Strongly Disagree Strongly Agree
3. The Leadership Development Program was delivered in the expected time frame I had for its utilization.
Strongly Disagree Strongly Agree
4. It was easy working with the Leadership Development Team when delivering the Leadership Development Program.
Strongly Disagree Strongly Agree
5. Overall, I am satisfied with the Leadership Development Program.
Strongly Disagree Strongly Agree
6. I would recommend the Leadership Development Program to others.
0 1 2 3 4 5 6 7 8 9 10



On-the-Job Reinforcement

Use goal setting tools to establish and track changes in business results or behaviors when participants are on-the-job. It also can identify scrap learning.



Welcome to Check-in to ChangeSM

As a participant, Check-in to ChangeSM allows you and manager/coach to identify success criteria and any potential barriers that are related to your recent program. The first step in this process is to identify your goals. Goals are best developed through an active discussion. Throughout this process you should always feel comfortable reaching out to your manager/coach for guidance and feedback.

My Programs

ChangeProSys Leadership 2020, Jun 13, '10

1 Goal Minimum Required

Articulate Strategy

[Approved](#)

5%
Below Goal

last updated on Jun 15, '10

Identify Successor

[Approved](#)

30%
Exceed Goal

last updated on Jun 15, '10

[Add Goal](#)

Select the most recent period date link to update your goal progress.

Period	Progress Towards Goal	Goal Progress
Jun 13, '10	5%	Below Goal
Jun 20, '10	5%	Below Goal
Jun 27, '10		
Jul 4, '10		

Notes	J.Metric	Areas for Support
6/15/2010 8:43:28 PM I have booked a meeting with you tomorrow at 3:30 to discuss this. We'll lay out a plan of meetings for you that will jumpstart this effort and get you back on track.	J.Metric	Areas for Support
6/15/2010 8:42:15 PM We need to focus on this, as I'm afraid that if we don't dedicate time in this area we won't reach our goals.	J.Metric	Areas for Support
6/15/2010 8:14:48 PM Still having trouble finding time to dedicate to this.	K.Wolsfeld	Areas for Support
6/15/2010 8:12:22 PM I haven't had the time to dedicate to this.	K.Wolsfeld	Areas for Support
6/15/2010 7:55:06 PM A good strategy needs to incorporate not just where you want to be, but how you are going to get there. You seem to have good focus on the end, don't forget to focus on the route.	J.Metric	Elements of Success
6/15/2010 7:53:06 PM I'll connect you with a couple of VPs that mentored me in the area of strategy. They will do a good job of letting you know where we want to be in 5-10 years and how your department fits into this.	J.Metric	Areas for Support

Advisors

17

Business Impact Exercise

- Control Group (side by side)
- Determine if learning projects influenced employee retention
- Employees with no learning projects averaged a turnover rate of 21%
- Employees with 2 or more learning projects averaged a turnover rate of 2%
- Clearly the control group vs. learning group shows a difference

Source: Dr. John Sullivan, Presentation at Analytics Symposium



Contact Information

For further information contact:

Jeffrey Berk

Chief Operating Officer

+1 312 676-4411

jberk@knowledgeadvisors.com

www.knowledgeadvisors.com