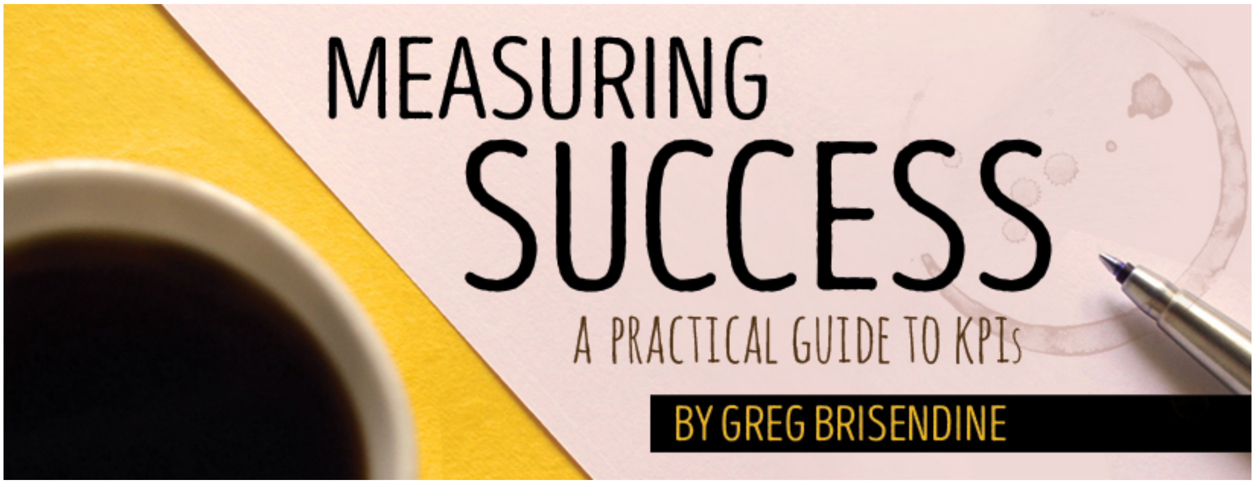

Measuring Success for Training

Any organization with more than two people usually ends up with some sort of training program. For many organizations, training is simply a cost center (like paying for electricity). But increasingly, when leaders invest time and resources in training they look for a return on that investment.

Learning measurement is a critical part of a learning strategy and much has been written about it. In the 1950s Donald Kirkpatrick wrote *The Four Levels of Training Evaluation* which has been the standard approach to learning measurement since then. For several years, I used those methods as well as my own methods to help business clients measure the impact of their learning.

Many folks begin measuring success with the measurement part which can get deep into the data before they know why they're looking for. The right measure of training is whether it did what it was intended to do. So before you look for data, be sure you know what behavior change you're expecting from learners. There is a logical progression from the intention to the learning objectives, to knowledge transfer, and finally to behavioral change.

The purpose of training is to maintain or change behavior in pursuit of one or more specific outcomes. At the highest level, those outcomes are what gets measured in a training measurement program.

More specifically, measuring success in training (as in many things) includes measuring both **effectiveness** and **efficiency**.

Effectiveness is how well the training accomplishes its organizational goal. This is often referred to as the business impact or business results of the training. Examples of effectiveness measures could include increased sales (for sales training), reduced injuries (for safety training), or new hire retention (for new hire training). These are what most business leaders want to know about training.

Efficiency is how well the training team makes use of time and resources. Examples of efficiency measures could include the content development ratio (how many hours it takes to develop a finished hour of training content), the number of training hours delivered (hours delivered multiplied by the number of learners), or training attendance (the percentage of learners scheduled who actually take training). These are what most training leaders want to know about training.

A combined approach
Effectiveness and efficiency must be considered together to measure success in learning. It's easy to be effective if you have no budgetary limits on training. Hiring an army of instructional designers and trainers to infiltrate every part of the organization is wildly inefficient but will be effective. Similarly, developing simple eLearning may look efficient when you eliminate (the cost of) trainers entirely, but that's sure to be ineffective.

Dr. Kirkpatrick described 4 levels and I recommend an additional level to capture more efficiency metrics. Each higher level is usually another degree of difficulty in getting the data and understanding the results. For this reason, every training program doesn't need to include all 5 levels. In short, don't spend $100k to measure the results of a training program that's only expected to deliver $10K in value. This is why I recommend a progressive learning measurement plan. It goes like this: If you efficiently deliver (L0) good training (L1) the learners will learn something (L2) which they will apply on the job (L3) and which will make a positive difference in the organization (L4).

Progressive Learning Measurement
<u>Level 0 - Service Metrics</u>. These are your primary measures of efficiency including training attendance, development ratio, and hours of training per employee. Think of these as measures of value vs. waste. If you have scheduled a learner to take training and they don't show up, that's wasted trainer capacity (a trainer with a class of 3 who can effectively run a class of 10 has a 7-person capacity that's being wasted). I

If you're brand new at learning measurement, don't worry about starting here. Start at Level 1 and create some actionable results in your organization. Then, as you get your measurement feet underneath you, make a plan for how you'll approach these efficiency measures.

<u>Level 1 - Learner Reaction</u>. The most common way to collect learner reaction is with a post-training survey. In fact, commonly referred to as an L1 survey, this is one of the easiest and most actionable data sets associated with training. But many organizations miss the value by only asking whether or not learners liked the training (which is why these are commonly referred to as "smile sheets"). Surveys used for Level 1 measurement should include three categories: reaction, relevance, and prediction.

> **Reaction** is an efficiency measure and is where most L1 surveys stop. Reaction questions ask the learner to rate[1] the trainer, the room, the food, or the materials (or all of these). This data goes back to the learning team so they can continuously improve the learning experience. As an efficiency measure, this is a measure of whether the training was a good use of this learner's time.
>
> **Relevance** is also an efficiency measure because training that isn't relevant to the learner is a waste of what would otherwise have been productive time at their job.

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[1] Asking for a binary (yes/no) rating on a survey question misses the opportunity to get a more nuanced answer. Most survey questions rely on Likert scales, which ask respondents to reply on a scale. For example, rather than asking whether they agree or disagree with a statement, a Likert scale asks whether they strongly disagree, disagree, are neutral, agree, or strongly disagree. This is an example of a 5-point Likert scale that provides a much richer response than a binary choice. Likert scales can range from 4 points to 20 points or greater depending on what level of detail you want.

Relevance questions could include how soon the learner will use the information (within a week, a month, etc.), whether they would recommend the training to a colleague, or whether it's appropriate for their role. Remember that simplicity is always the right place to start. A relevance question could simplify ask the learner to rate the relevance of the training on a 1 - 5 scale where 1 is not at all relevant and 5 is extremely relevant.

Prediction is an effectiveness measure and one that's often missed. Dr. Kirkpatrick's level 4 is for business results and the best (and most difficult) measures of business results are the key performance indicators (KPIs) themselves (process outcome data from a sales process, transactional process, or other process).

There is actionable data that comes from asking learners whether they think the training will improve the KPIs. Some will say this self-report data isn't as good as the business data and they're right. But if all the learners tell you the sales training won't improve sales, don't wait for the sales numbers to come in. You already know there will be a gap. Predictive questions in your Level 1 survey are an enabling indicator (early warning indicator) of business impact. And in situations where isolating training from other variables prevents useful business impact data, the results of this predictive question can provide actionable business impact data that you otherwise wouldn't have.

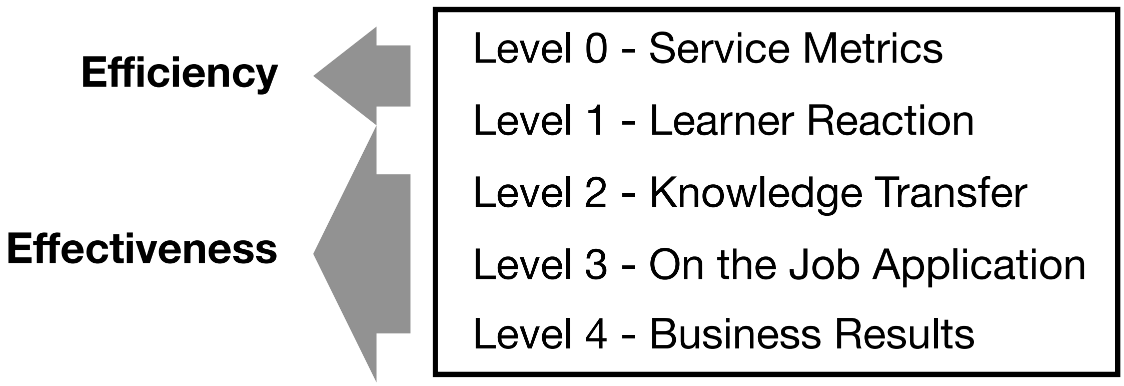
<u>Level 2 - Knowledge Transfer</u>. This is a measure of whether the learners leave the training with the knowledge you intended for them. The most common knowledge transfer method (and the one I recommend) is a simple test. A well written test doesn't need to be long or complicated to let you know how well the knowledge transferred. In some cases it's also useful to provide a pre-test and post-test to measure the change in knowledge, not just the post-training results. Developing and administering a test is usually more effort than a survey and only you can know if that effort is worth the cost. Similarly, a pre- and post-test model is more effort for those results, which may or may not be worth the cost.

<u>Level 3 - On The Job Application.</u> This is often the level most skipped in learning measurement and for good reason. Level 3 measures on-the-job application of the knowledge you measured in Level 2. Application of a specific skill can be difficult to separate from the regular day-to-day work. Most Level 3 methods require manual data collection from someone who observes the target behavior. For me, this has always conjured images of supervisors with clipboards lurking behind filing cabinets to observe behavior. In critical programs, this data may be necessary, but I don't find that need to be common. Instead, my practice for Level 3 is to leverage existing processes like employee performance reviews. Most performance reviews assess employees across a series of competencies and most employee training is delivered in support of one or more of those competencies (even if targeted to a sub-competency or action). Because performance reviews probably already exist, my practice is to identify the key competencies that are already part of the performance review and map the learning objectives to those. Then, measure the impact of those historic competencies (as tracked in the performance review process) for Level 3 results.

<u>Level 4 - Business Results</u>. The holy grail of learning measurement is business results. That is to say, improvement in the KPIs that comes from the change in human performance. Essentially, this is the measurable connection between the training and the KPIs. Making this connection is possible but can be difficult, because statistically isolating the results of training from all the other initiatives in your organization will be a challenge. My best recommendation here is to determine whether the cost of this analysis justifies the effort to do it. Don't get me wrong, the results of a business results analysis is powerful, but it's easy for the cost of the analysis to outpace the value of the program.

Summary
That’s the full picture of measuring success for training. If you’re new to training measurement my recommendation is to build a survey with reaction, relevance, and prediction questions and review the results of those three categories with your business partners. At the same time, start collecting your Level 0 efficiency measures. The process outlined in *Measuring Success: A Practical Guide to KPIs* is a great way to define the mission, strategies, goals, and KPIs for a training department.

Learning Measurement



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