

Training Evaluation

How to evaluate learning & development programmes

A short paper by Andy Matheson & Ann Akers



What do we need to evaluate

Spend on learning and development is rightly put under scrutiny. As with any costs for a business we should take a look at it and see whether it delivers value for the money we spend. This short document aims to provide some perspectives on this challenging topic. In this document we will consider the following areas and will conclude with a few perspectives.

1. Reaction - did people enjoy the learning and feel it was professional and a valuable use of time?
2. Learning - did they learn anything?
3. Behaviour change - did they do anything differently as a result of attending?
4. Business relevant - was the learning relevant to the organisation? Did it help achieve organisation priorities?
5. Results - can we measure the results of the learning?



What can we measure? How?

At the end of the day, when we attend a training programme, we are customers and we should capture the thoughts and feelings of those who have experienced a learning event. We should use this information to improve the customer experience (or in this case the experience for our delegates).

This diagram shows the key areas we should capture within a week of a learning event.

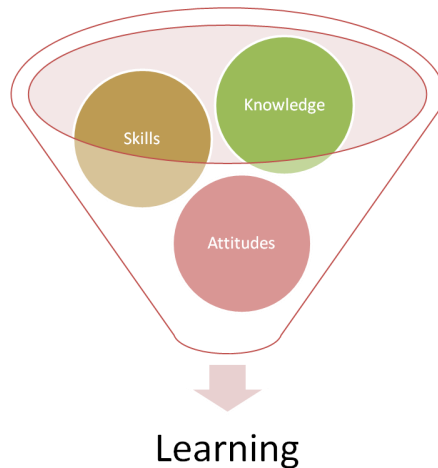
This evaluation needs to consider the core of the programme - the learning content, design, structure and appropriateness, as well as the wider perceptions on the venue, admin and materials used.

The data is unlikely to be perfect. Delegates will often rush to complete this, especially if asked for at the end of the event. It does however provide an interesting and valid snapshot of perceptions and it is easy to create simple numeric scales around these.



What can we measure? How?

It is possible for someone to enjoy the experience of a training programme and be full of admiration for the facilitator but not actually learn anything. Our education system shows that learning can be evaluated by constantly subjecting students to tests, examinations, assessed presentations and observations. When it comes to corporate learning and development programmes, there are many options open to us to show whether people have learned what we hoped. The method we use does depend on the nature of the programme:



Knowledge - If people are expected to acquire knowledge then we can use written tests or structured interviews or discussions to ascertain the level of understanding

Skills - When evaluating people's ability to demonstrate new skills, then we would need to see these put into action. For example, on a coaching skills programme, we could create a role play which enables a simulation of a coaching session to be observed and evaluated

Attitudes - This is a tough one to evaluate. Not least because what people say and what they think can be very different. For example we might be looking for people to have a more positive attitude towards customers. This is very hard to measure

Key Issues for evaluation of learning

- How much time do you have? On a one day programme where time is precious you may not have time to do this without sacrificing the learning itself
- Could it appear 'patronising' - can you not trust people to take away the what they want from the learning
- How formal should the evaluation be? Should you issue certificates? Should people now be 'authorised' or 'approved' in some way?



Written Tests

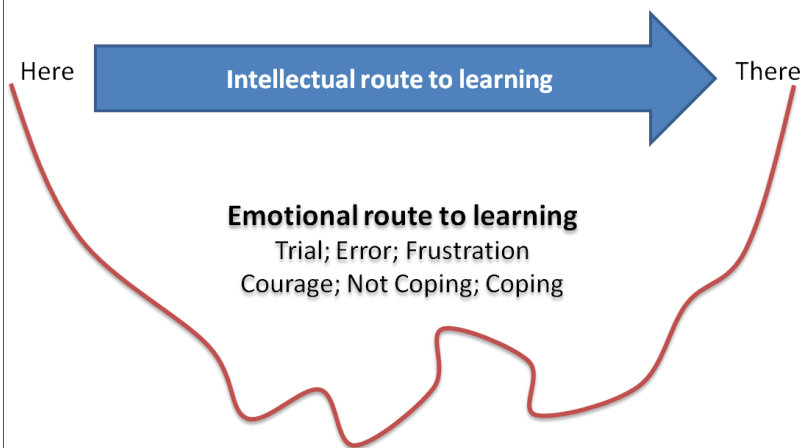


Demonstrate
Presentations
Group work



Trainer
observation
Role plays
Simulations

What can we measure? How?



It is possible for someone to enjoy a learning event that aims to change their behaviour and to learn the lessons from it. However they may return to work and not make any changes to their behaviour even if ‘intellectually’ they see why this might be a good idea.

Part of the learning process therefore involves taking the learning and applying it at work and dealing with the reality and potential barriers that prevent us from implementing new ways and behaviours.

When we return to work, there can be considerable pressure **not** to apply the learning:

- culturally, participants may be trying to work in a way that doesn't fit with the organisation
- they may be simply too busy to try. The day job and reality of the pressure gets in the way

- they may have little or no support from their line manager or other areas and feel isolated as they try to introduce new ways of doing things
- they may experience peer pressure (group norms and expectations) not to change

How to evaluate?

A critical question here is ‘whose role is it to work carry out evaluation at this level?’. There are some behavioural indicators but by definition these occur once the training is over. The diagram shows some of the available methods available. The most obvious person to judge the success of any learning is the participant’s line manager. We can also capture perspectives of others including customers, colleagues or employees.

360 feedback

Manager perceptions

Customer feedback

Climate survey (attitude survey)

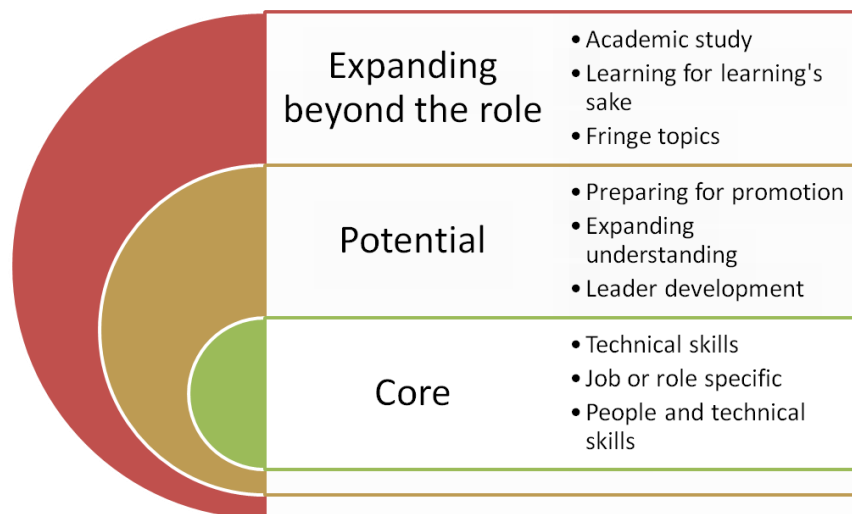
In many instances these observations remain anecdotal. But we can turn this into objective data by using 360 feedback scores, organisation climate or opinion surveys. By comparing data before and after a learning event we can look for evidence of progress.

The downside to this is that again it can be time consuming and resource heavy to capture the data.

It is also difficult to prove that improvements arise directly from the learning. It is possible that there are other reasons for the improvement.

What can we measure? How?

This level of evaluation doesn't appear in Kirkpatrick's model for evaluation but we have included it as it is a critical consideration. The spend on learning and development can often be put under close scrutiny by the business - and rightly so. A key consideration is how relevant is the learning to the business?



1. Core - Every role has a core set of knowledge, skills or behaviours that are critical to success. You could argue that if a person's role is critical to the success of the business then there is no need to evaluate training spend here. The training is part of helping someone to perform with competence and therefore we just need to make sure the training is cost effective and delivers what it promises. We also need to consider whether learning is helping the business to achieve its key goals and objectives

2. Potential - Developing people for promotion and beyond their current role also makes sense. However at this point the business will pay more attention to the level of spend as they will be keen to see that money is spent in the right way on the right people

3. Expanding beyond the role - This is the area that comes under the most scrutiny. Many organisations will introduce learning programmes that have the potential to be loosely connected to the business and its

goals. The business will rarely complain about a well run sales training programme if it is trying to build a business. But it will cast a critical eye on spend on things it perceives at the edge of the business. Topics such as assertiveness training, team development, understanding personality type can become dominant as part of the L&D offer.

At the end of this document is an appendix that shows:

- How to summarise the areas that are strategically important to the business
- How to 'score' training programmes against these
- How to summarise feedback from delegates
- How to create a Training Strategy Audit Matrix and how to use this for evaluation and planning

What can we measure? How?

The golden chalice of evaluation! Can we prove the link between a training programme and business results?

In some cases it is possible but the challenge is tough because there are so many variables. For example an increase in sales could be attributed to a sales training programme but could equally be down to the impact of a marketing budget or an upturn in the economy.

The following methods might help:

Evaluation Method	Action
Building projects into programme design	For modular training programmes, we like to challenge participants to work on business projects that will either make money, save money, improve efficiency and effectiveness, improve customer service or improve the levels of engagement for employees. In this way participants have to give something back. Ideally the revenues or savings from projects exceed the cost of the programme
Agreeing business goals but listing the dependencies	If you are going to run a programme that is designed to improve some specific business objectives then put those objectives in writing. For example write down the goal 'our aim is to improve customer feedback scores by 10%' But then add the other things that need to happen to achieve this. If it is purely down to training then that's fine but record any other actions needed. So add 'and this is dependent on the following other activities being implemented successfully' and make a note of these
A clear link	In some instances it is possible to clearly link development to business results. This is especially true of training events linked to internal problems or issues where there is a reduced chance of external influence. For example, a training programme that aims to improve efficiency and effectiveness
A reminder	We can measure things in terms of quantity, quality, cost or time. These are the indicators we should look for when evaluating learning

‘Anyone can go on any training job related or not and we will pay for it’

This is a training strategy for Johnsonville Foods who make sausages (based in the USA).

They have included ‘continuous learning’ as one of their key values and provide their employees with the following perspectives:

- You understand your strengths and weaknesses.
- You put yourself in situations where you can learn new things.
- You take an interest in the world around you.
- You learn from your mistakes.
- You read or take formal classes when you need to.
- You meet people who work at other companies and learn from them.
- You ask others for feedback and use their advice.
- You write and follow through on a development plan each year.
- You use what you learn.
- You do whatever it takes to help others develop their skills.
- The word ‘you’ stands out here. This is because it is up to you to learn and grow. Others can help, but nobody can do it for you.

It does the raise the question. If a sausage factory can justify investment in training. Why can’t you?

Or to quote Tom Peters:

‘If you think training is expensive - you should try the cost of ignorance’



Identifying Strategic Important Factors (SIF's)

What are the current high priorities for your business and what is their relative importance. You might find it useful to use this table.

1. Write down the key issues, strategic priorities for your business - write these in column 1. (The ones here are only examples)
2. Weight them out of 100 so that you can show which of these are most important at the moment
3. Take each of the main service training programmes you offer and score them against each of these priorities. You are scoring them out of 10 where '10' means this programme is a direct and positive help to this key issue: a score of '1' means a very low link with the key issues for the organisation. Write these scores in column 3
4. Multiply the weight by the rating and enter this score in column 4. Total this column and divide by 10
5. Do this for each of your learning and development areas and keep a note of the scores
6. This process enables you to compare the various services you offer against the organisation's key priorities and to evaluate which ones are the most important /relevant to the business, 10 being a perfect fit.

Example Strategic Importance Factors

- Grow market share
- Revenue growth
- Cost reduction
- Building IT expertise
- Differentiation
- Customer focus
- Leadership excellence
- Compliance
- Employee engagement

SIF	Weight Each SIF (a) (example)	Rating your training events		
		Rate out of 10 (b)	(a) x (b)	
1 Growing income	20	5	100	
2 Reducing costs	20	6	120	
3 Improving customer service	10	6	60	
4 Differentiating from key competitors	10	5	50	
5 Technology innovation	10	4	40	
6 Developing future leaders	20	8	160	Divide by 10
Totals	100	Total score for example training	530	5.3

Business relevance - Blank SIF Template Appendix II



		Training Event 1		Training Event 2		Training Event 3		Training Event 4		Training Event 5		Training Event 6	
SIF	Weight (a)	Rate out of 10 (b)	(a) x (b)	Rate out of 10 (c)	(c) x (b)	Rate out of 10 (d)	(d) x (b)	Rate out of 10 (e)	(e) x (b)	Rate out of 10 (f)	(f) x (b)	Rate out of 10 (f)	(f) x (b)
Totals	100	Total		Total		Total		Total		Total		Total	

Analysing The Data		Identifying the most attractive areas of business
Explain	Your scoring for each area	
Compare	Try to turn the data into a bar graph to show a visual comparison	
Challenge	Has this data changed your views on the relative importance of different learning events and how you spend your time/allocate resource?	

Business relevance - Customer Value Appendix III



Identifying Customer Success Factors (CSF's)

For this activity

1. Identify a specific training programme to analyse
2. In column 1 you need to list the factors that your customers value; the things they will use to judge your performance. Write down no more than six. Factors may include: perceived quality, pace, relevance, facilitators and so on
3. Weight the relative importance of your CSF's by scoring them out of 100. Give a higher weighting to the most important criteria
4. Consider the customer needs in turn and score your performance against them. A '10' would mean that you are very good at meeting this need; a '1' would suggest you are falling well below their expectations. Be as objective as you can when doing this
5. Multiply the rate by the weight and total the column
6. You will need to repeat this activity for each training programme

Example CSF's

- Quality of facilitators
- Relevance to the workplace
- Up to date/fresh thinking
- Pace
- Quality of materials
- Level of personal attention

The training programme we are analysing:

Customer Success Factors	Weight (a)	Scoring Your Offer	
		Rate out of 10 (b)	(a) x (b)
1			
2			
3			
4			
5			
6			
Total	100		

Business Relevance - The Training Strategy Matrix - Appendix IV



Drawing up a Training Strategy Matrix

On the previous couple of templates you have identified two key variables for each of training programme you offer. This enables you to plot a point on a graph which is what you need to do now.

Use the next template to put a mark on the graph to show where the Strategic Importance Factors and Customer Success factor scores intersect. Your co-ordinates will fall into one of four sections:

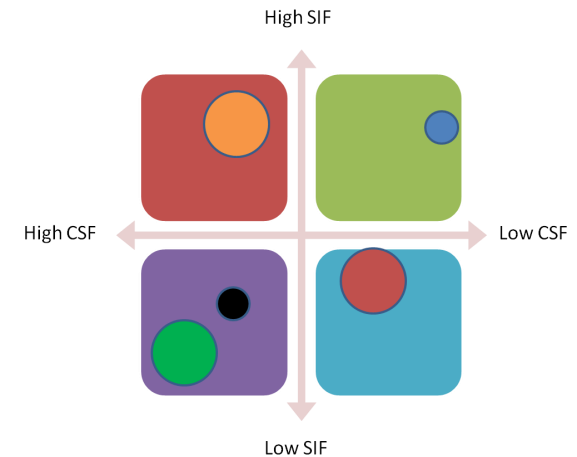
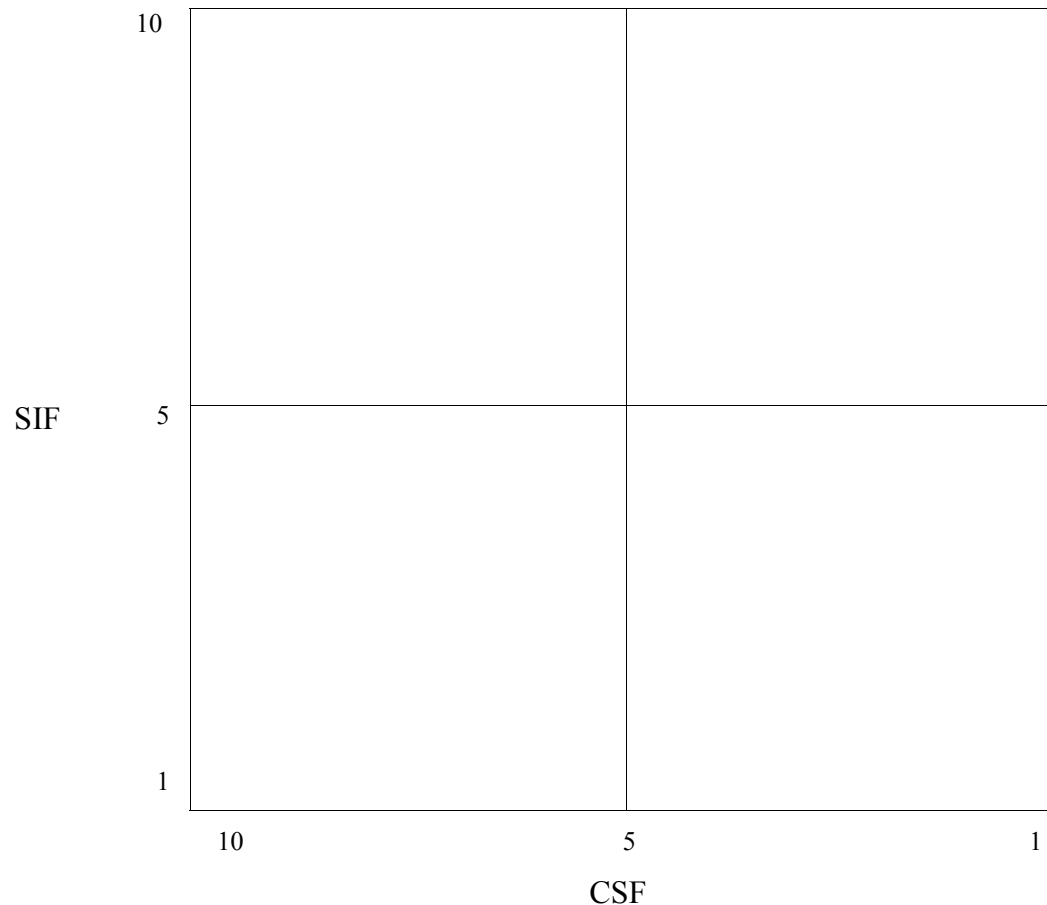
- Criticism Corner** - where the strategic importance is low and you don't deliver
- Operational excellence** - The business likes and values what you do although it is operational in focus
- Strategic potential** - Things you recognise as important but you need to build credibility here
- Strategic focus** - where you are seen as working at the most strategic level and perform to a high level



Using The Strategy Matrix to evaluate your strategic

Your attitude to:	Low SIF, Low CSF (Criticism Corner)	Low SIF High CSF (Operational Excellence)	High SIF, Low CSF (Strategic Potential)	High SIF, High CSF (Strategic Focus)
Time spent on these	Minimal - possibly none	Enough to maintain but manage it	Set up projects, get things moving	Maintain or increase
Products or services	Get rid of them if you can	Stop doing the least relevant things	Develop new offers	Keep improving them
Cost	Minimise	Low—tight budget management Seek to reduce	Agree some initial investment	Maintain/ increase budget
Persuading the business/marketing	None—unless you need to convince them they need it	Minimal—keep the business up to date	Test the water, trial, pilot and publish successes	Publish and success stories—keep the business aware
R&D	None	To increase value at low cost	Invest	Expand and invest
People	Cut back the organisation	Reward people for efficiency	Invest	Put your best people on the case Pay them well

Customers - Training Strategy Matrix - Appendix IV



You should indicate the level of resource for each area. This can be by cost, time or headcount, you decide but use the same measure to ensure consistency. In this way, one page will sum up everything you do and how well it is perceived by the business

Analysing The Data		Plot your scores on this matrix
Explain	Your positions on the matrix	
Compare	How much time and resource goes into each service. You can represent this with numbers or circles	
Challenge	We suggest that each quadrant on the matrix demands a different strategic approach. How do your current strategies compare to the proposed strategies in the model? Does this give you any cause for concern?	