

Creating A Robust Learning Measurement Strategy



And Why It Matters

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Strategic Measurement Consultant

Optimizing the Performance of People

Who We Are - What We Do

Global Leader in Learning and Human Capital Analytics Solutions

- Thought leadership in analytics
- Collaboration with and validation by industry gurus
 - Jack Phillips, Ph. D
 - Gary Becker, Ph. D
 - Robert Brinkerhoff, EdD
 - Jac Fitz-Enz, Ph. D
 - Josh Bersin

Measurement Expertise



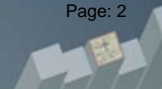
- Learning and Human Capital (HC) Analytics focus
- Data collection
 - Evaluations
 - Tests
 - Assessments (360)
 - Surveys
- Robust reporting
- Real-time Business Intelligence

On-demand Evaluation Technology

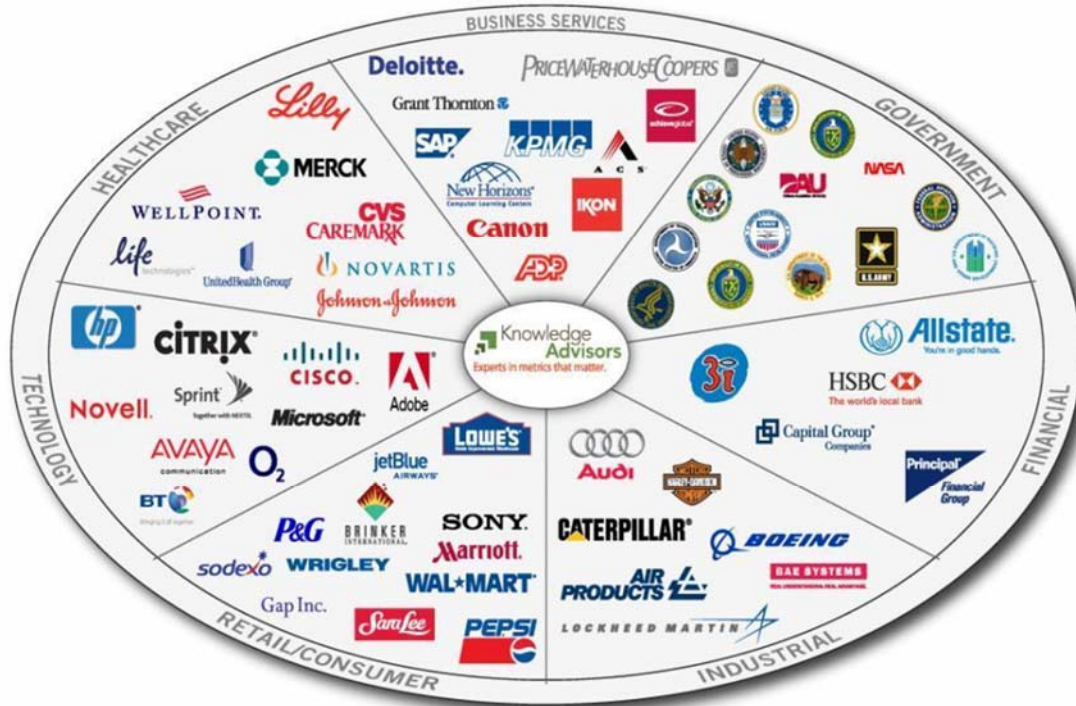


- Integration with LMS and HRIS systems
- Benchmark database of 1 billion data points
- Benchmarks by course type, audience, delivery type, region, and more
- Validate quality, effectiveness, impact, and value of learning

Integrated Analytics Solutions with Benchmarking



Sample of Organizations Served



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Objectives For This Session

- Articulate the value of a learning measurement and evaluation strategy for your organization
- Identify the critical elements of an impactful strategy
- Describe the process to build a compelling measurement and evaluation strategy



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- The importance and value of a strategy
- The step-by-step process
- The implementation
- What you can do now

Why An M&E* Strategy For Learning?

- Enables alignment with HR and the business
- Drives more integrated approaches to evaluation and measurement
- Focuses your investment in M&E on high value-add processes, capabilities and outcomes

Without a strategy, measurement and evaluation becomes something decided in isolation on an ad-hoc, course-by-course basis.



*Measurement & Evaluation

Do You Need An Evaluation Strategy?

Question	Yes	No
1. Are you mostly using Level 1 reaction surveys?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is evaluation usually considered after the class has been completed?	<input type="checkbox"/>	<input type="checkbox"/>
3. When conducting evaluation studies, do results go into a black hole?	<input type="checkbox"/>	<input type="checkbox"/>
4. When conducting higher level evaluations, do different parts of the organization use very different methods?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the emphasis in your evaluations on getting a number (X% improvement, Y% ROI) vs driving actions and continuous improvement?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are you spending a lot of money for evaluation but aren't sure if you are getting much value?	<input type="checkbox"/>	<input type="checkbox"/>

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M&E Strategy: Is - Is Not

What it is	What it is not
<ul style="list-style-type: none"> ▪ High-level goals of measurement and evaluation in your organization ▪ The approaches your organization will take to ensure that the goals are attained ▪ Where you will focus your measurement and evaluation efforts and investments ▪ Your milestones for getting there 	<ul style="list-style-type: none"> ▪ Kirkpatrick's four levels (+ Phillips ROI) ▪ Technology ▪ Policies ▪ Templates ▪ Deciding what surveys get used for different types of training

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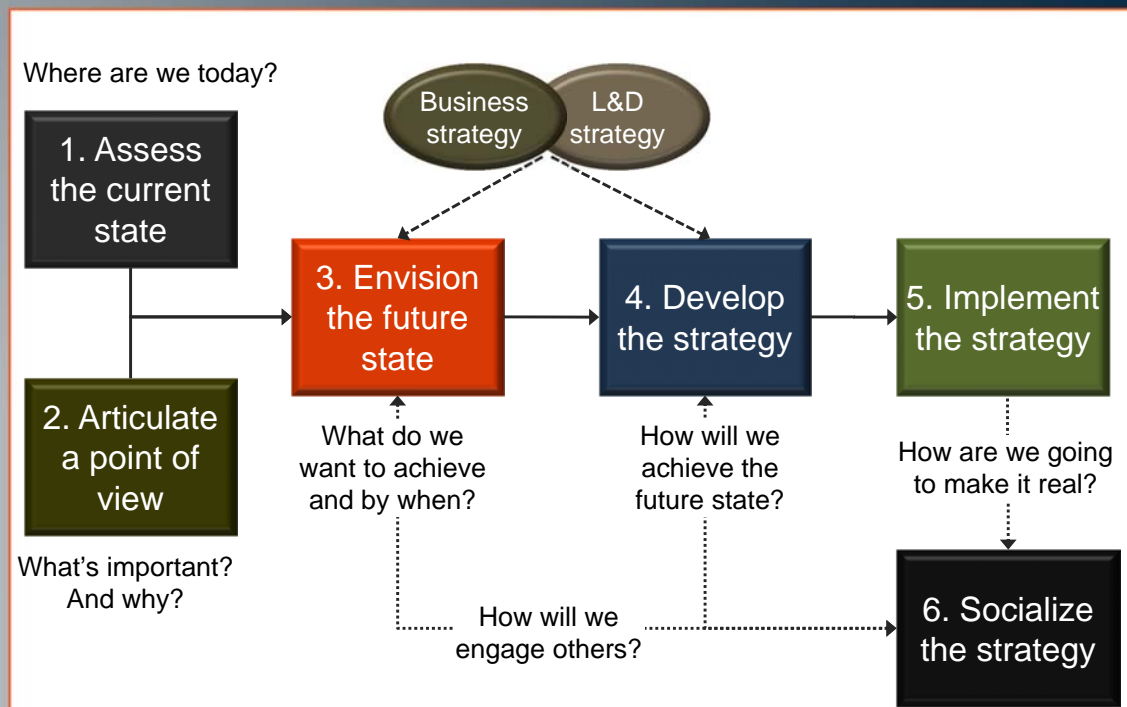
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- The importance and value of a strategy
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M&E Strategy Development Process



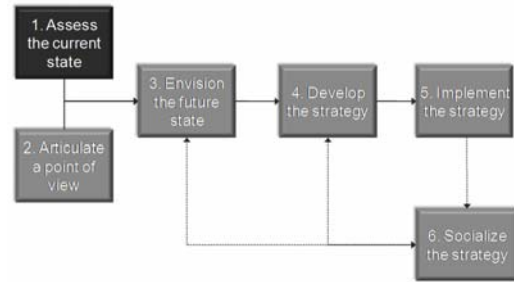
1: Assess The Current State

- What are your M&E capabilities?
 - What are your strengths?
 - What are your weaknesses?

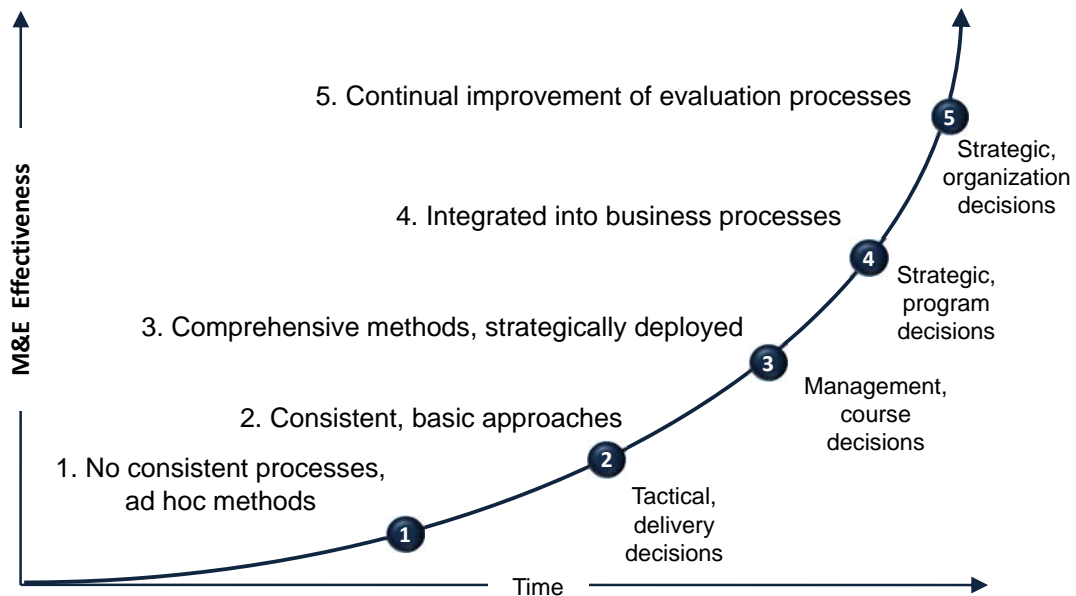
- How do you compare other organizations?

- What are your business drivers for measurement and evaluation?

- Is there an urgency to act?



Current State: Where Are You Today?



Adapted from Carnegie-Mellon Capability Maturity Model

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Current State: Sense of Urgency

- What does the business want or need that you are unable to fulfill?
- What is the opportunity if you act?
- What is the consequence of inaction?
- How quickly must you make progress?

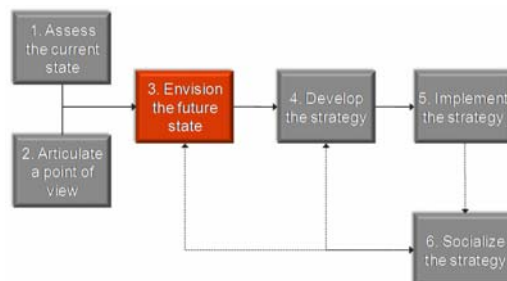


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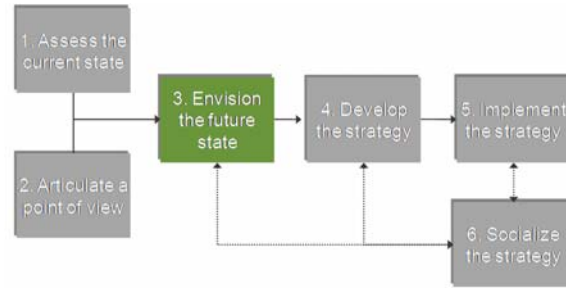
2. Articulate A “Point Of View” (POV)

- Why is it important to establish a clear POV?
- Elements of a POV
 - How important is measurement and evaluation in your organization?
 - Is measurement a cultural norm outside of L&D?
 - What drives decisions?
 - Is consistency of approach important? Is it even possible?

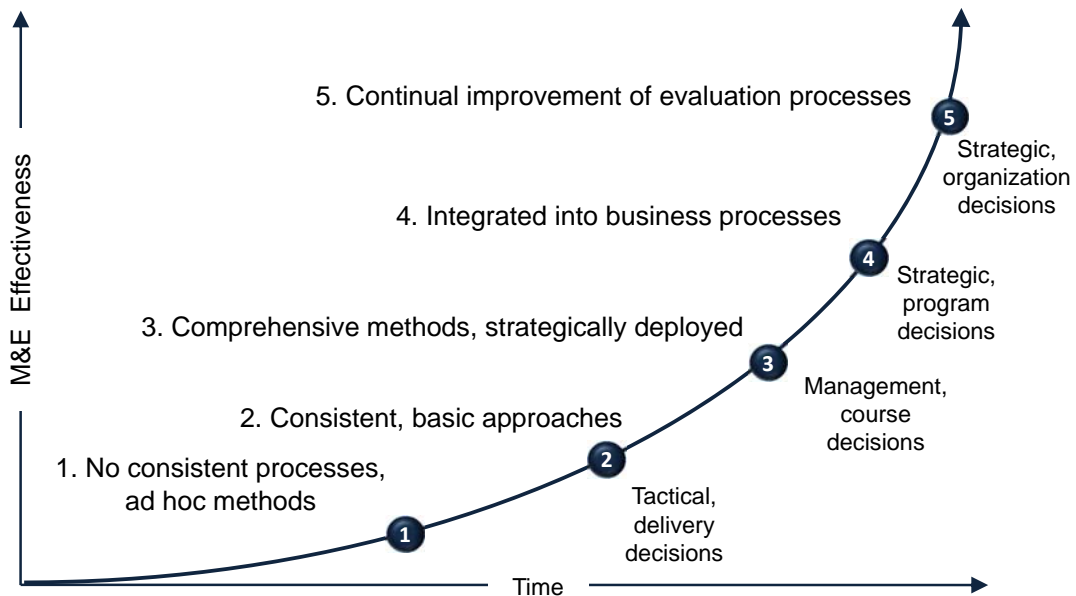


3. Envision The Future State

- Align with the overall strategy of Learning and/or HR
- Identify the emerging needs of your stakeholders
- Identify what's next on the landscape
- Envision how you would operate differently with a robust M&E strategy

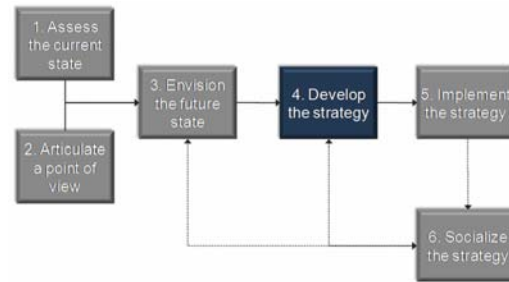


Future State: Where, By When?



4. Develop Your Strategy

- Actively engage key stakeholders
- Align the strategy with the needs of the business and the overall L&D strategy
- Determine what you must do (and by when) to achieve the desired state
 - Address evaluation holistically
 - Technology is necessary
 - But not sufficient



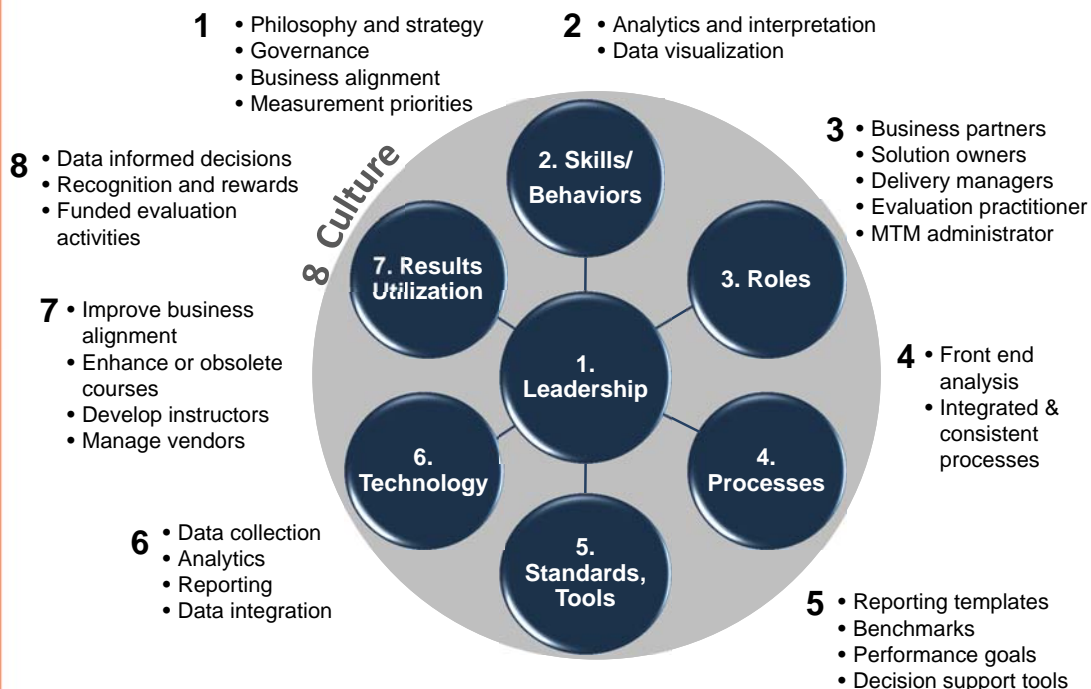
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Sustainable Measurement Capability



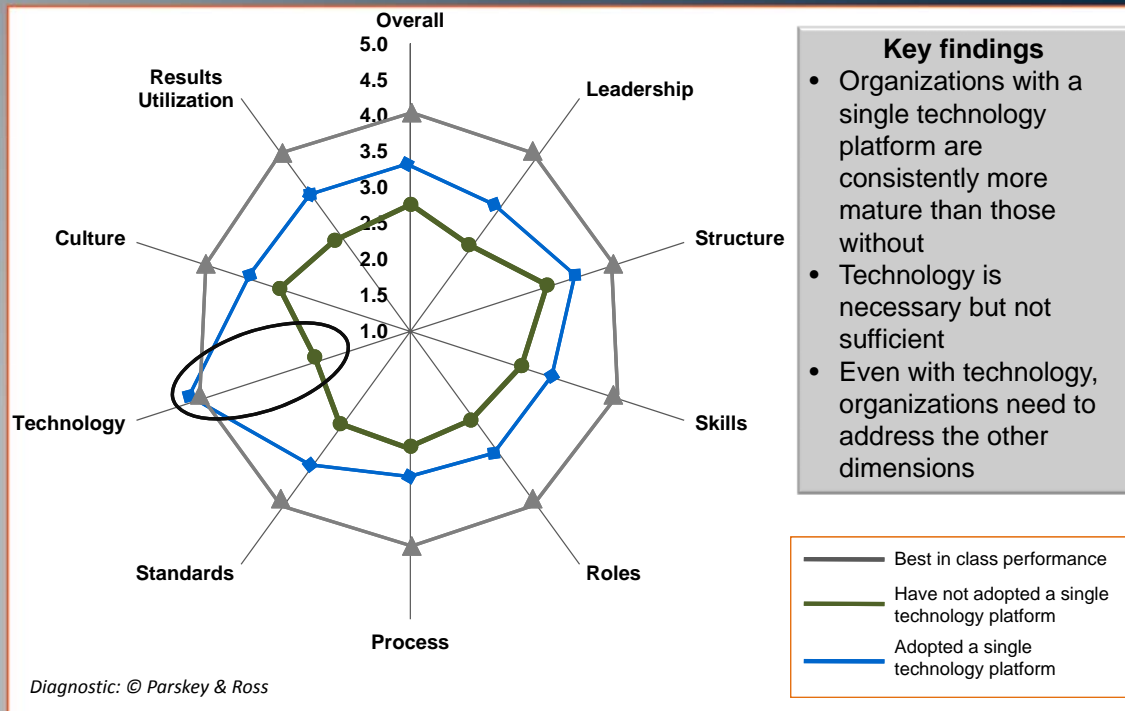
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Findings From The Diagnostic



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Comments From Respondents

• Leadership & Culture

- ↑ “The current culture is focused on adding value and this new focus is setting the stage for creation of a measurement strategy.”
- ↓ “Learning measurement is a key initiative but has had little to no action behind such initiatives.”
- ↓ “Our organization basically is in the ‘check box’ mode. Complete the training so the record shows it is done.”
- ↓ “There is a verbal commitment to measuring the value of learning in our organization, but there has not yet been a focused effort on integrating it into the instructional process.”

• Results Utilization

- ➡ “We are still at the basic level of using the evaluation data.”
- ➡ “We use learning evaluation data for decision-making at a very basic level.”
- ↓ “Evaluation results rarely are used in decision making for training program changes.”



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Strategy Example

- Establish a governance council comprised of engaged business partners and L&D senior leaders
- Implement common and high-value methods, tools and processes across employee, customer and partner organizations to enable consistent use of evaluation data across the enterprise
- Utilize a single effective and efficient technology solution across all learning organizations for gathering feedback and reporting results
- Develop performance standards for solutions; critically assess and publish results quarterly across all levels of evaluation
- Invest in solutions that accelerate performance of our people and the business
- Demonstrably improve L&D competencies in measurement and evaluation



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Agenda



- The importance and value of a strategy
- The step-by-step process
- **The implementation**
- What you can do now

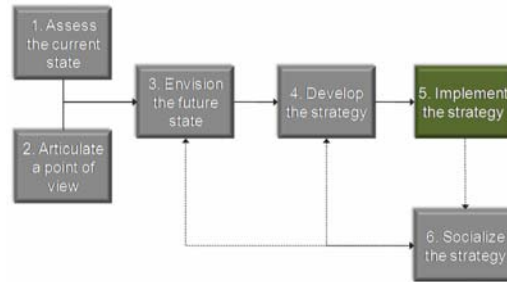
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5. Drive Your Implementation

- Identify how you will implement each element of the strategy
- Begin with leadership
- Identify your implementation priorities
- Engage a cohesive team
- Develop a project plan with milestones, tasks, dependencies; review progress monthly
- Clearly define accountabilities
- Develop a change and communication plan
- Identify your risks and challenges and plan for them



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Implementation: Keep It Going

- Identify opportunities for quick wins
- Ensure solutions* have:
 - Defined success measures
 - A performance goal
 - A defined measurement approach
- Demonstrate how evaluation data drives decisions and actions



*Particularly strategic, visible or costly programs

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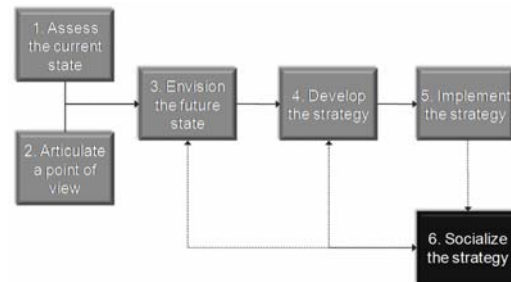
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6. Socialize The Strategy

- Develop a communications plan
- Communicate:
 - Why the strategy is important
 - What it means to them
- Aim for two-way dialogue
- Identify
 - Early adopters
 - Success cases
 - Potential resistance
- Manage the change



Agenda

- The importance and value of a strategy
- The step-by-step process
- Implementation elements
- What you can do now

Get Started Now

- Assess your current state
 - How robust are your evaluation processes?
 - Where are the pockets of excellence?
 - Where is evaluation data being used?
- Start small
 - Develop a mini-strategy and evolve
 - Take a crawl, walk, run, approach



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...And Plant Seeds For The Future

- Ask measurement oriented questions
- Distribute articles on learning measurement
- Publish success stories
- Create pull (from business partners and colleagues)



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Q&A



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