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Taking a Strategic Approach to Evaluation

Proving and Improving the Value of Training

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Published by Pfeiffer

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Passion

We share a passion for helping organizations avoid costly short-sighted decisions. Asking the right evaluation questions will help the organization begin not just to determine what happened in the past, but learn how it can increase the results in the future.

A few years ago I witnessed a situation that many training professionals probably have experienced. A company was trying to improve sales results. They put the entire sales force from five different U.S. regions through the same training. One region used the skills, tools, and process from the training to help make several large sales (one of which was landing a new multi-million-dollar account). The sales reps and sales managers from this region stated emphatically without qualifiers that they would not have made those significant sales without the new training.

The sales reps from the other regions never really capitalized on the training. They used a few concepts and tools from the process, but never saw any significant sales come from the training and eventually stopped using the tools and concepts altogether.

It is interesting to note that the training provided to all these sales regions was identical; delivered by the same facilitator, using the same design and materials. The sales reps from the various regions were equally as experienced and successful—and were literally sitting side-by-side in the same classes. Yet, the sales reps from one region were able to turn the training into concrete business results, while for most of the participants the training never led to any worthwhile outcomes.

After the initial workshops with this training, the organization made the decision to stop providing the training, because it wasn't seeing enough tangible evidence across all the regions that the investment was paying off or that the training was being used.

This company made two fatal errors—errors we see repeated frequently by many other organizations. This situation brings out the limitations and problems that face most training evaluation and ROI methods used today by L&D departments. Most popular evaluation methods are focused on trying to prove the value of the training by:

- Trying to compute the average (arithmetic mean) results of training across all participants, and failing to dig out the truly great results the training was resulting in for some of the people.

- Assuming that the training itself delivers the results, and not measuring the other factors in the equation—factors that often have more to do with training impact than the training itself.

Looking at specific results and usage of training by individuals is valuable. Focusing on the average (i.e., in statistical terms, the central tendency) can lead to misguided conclusions and decisions. Consider this example. If we had Bill Gates (founder of Microsoft) and one thousand homeless people together in a room, the average net worth of each individual would be more than $40 million dollars. That average is an interesting statistic, but it doesn't begin to tell the real story or help us determine how to improve the financial results of the vast majority of the people in the room. By focusing on the average without digging into the specific cases, it would be easy to reach some erroneous conclusions.

In addition to the inherent limitations of relying on averages to evaluate the results of training, we also said that another mistake often made by L&D professionals is focusing almost exclusively on the training itself as the "cause" of the results.

The best result that training alone can ever accomplish is an increase in capability—the ability to perform. A good managerial skills course, for example, can increase the managers' skills and knowledge related to key supervisory tasks, such as coaching or resolving conflict. The value from this training comes when capability is transformed into improved job performance, when the newly trained supervisor effectively uses the new skills in important situations. Training that is well learned, but never used, or poorly used, produces no value for the business that invested in the training.

Getting *performance* improvements from the *capability* improvements of employees is a performance management challenge. Factors such as direction, feedback, accountability, incentives, rewards, job aids, and tools all work together to shape and drive performance. When these factors are effective, complete, and aligned, employee capability will be leveraged into superior performance. When they are not, performance will consistently remain at levels far below employee capability. Research on training impact convincingly documents the potency of these factors. Best estimates are that 80 percent or more of the eventual impact of training is determined by performance system factors, while the remaining 20 percent or so is driven by variations in the quality of the training intervention itself and the characteristics of the learner, such as inherent ability and motivational values.

It is easy to imagine what would happen to a supervisor who returns from the management skills training and encounters performance system factors that are not aligned with the training. If, for instance, the supervisor's boss doesn't put much faith in the concepts, then the boss might influence the person not to use the new approach (or simply not encourage or coach the person to use the new skills effectively). Or, for another example, it might be that using the new skills initially takes longer, and because of other work pressures on the job, this newly trained person, out of frustration, reverts to the old way of managing. In sum, any number of these and other factors, alone or in combination, are likely to impede the impact of this training despite how well the training worked to produce the desired new skills and knowledge in the trainee.

Given this reality of performance system and training interdependency, learning professionals don't need an evaluation method that keeps rediscovering this painful truth. Instead, they need a strategy and method for changing these predictable results. The overarching purpose of any training measurement strategy should be twofold:

1. To dig out and understand the many factors that keep training from being more successful

2. To use the evaluation findings to teach the key stakeholders in the organization what needs to be done to turn the training success rates from their current and miserably low rates of impact into consistently better outcomes for increasingly larger numbers of trainees

This more than anything else will continuously improve the rates of return on training investments. Training today yields about an ounce of value for every pound of resources invested. The goal is to reverse this recipe—to get a pound of value for an ounce of investment.

Returning to my opening story about the sales organization, here is how they could have avoided making their costly short-sighted decision. Instead of asking the question "On average how well is the training working?" the sales organization should have been asking a different set of questions.

- "What are the best business results the training can produce when it is used?"
- "When the training did work, why was it working?"
- "When the training didn't work, why wasn't it working?"
- "What can we as an organization do so that more people can leverage the training as well as the most successful sales reps are using it?"

The answers so these questions will help the organization begin to determine not just what happened in the past, but how it can increase the results in the future that this program—and others—can help produce.

By contrast, another organization used this strategic evaluation approach to help them get maximum return from their sales training efforts. They were investing heavily in launching new systems for the market. In addition to the substantial product development investment, they invested heavily in training to teach their sales force how to sell this new capability. By conducting an impact evaluation early in the roll-out cycle for this training and focusing their efforts on the questions above, they were able to identify numerous examples of where sales reps used the training in ways that led to improved sales results with specific accounts. They also discovered that the sales reps who achieved the greatest sales for these new systems were the same ones who worked closely with their sales managers both before and immediately after the training to focus their learning efforts and to plan sales efforts.

For HRD professionals this finding probably doesn't come as a shock. We all know that management support and coaching lead to greater use of new skills learned in training. However, armed with this information the sales training manager was able to have a different type of discussion with the sales VP, pointing to specific sales that were made because sales reps used the training AND making the link between a manager's direct support of the training and these sales increases. Based on this vital information, the sales VP mandated that, before any more reps were allowed to participate in the training, they must meet with their managers before (and after) the training to plan where they were going to apply their new skills. In short the rule became: "Don't bother getting on the plane to come to training without meeting with your manager first."

Conclusion

This approach to evaluation fundamentally changes the nature of the discussion that training leaders have with senior stakeholders. The dynamics shift from defending the results and justifying budgets to discussing examples of specific business outcomes (quantitative and qualitative) and the specific performance system factors that need to be addressed to make sure those types of results happen more often.

The real power of this evaluation strategy is not in *proving* the value of past training, but in *improving* the value of future training.

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