

Measurement Demystified

How to Create a Comprehensive
Measurement and Reporting
Strategy

Why We Wrote The Book

- Make it easier for our colleagues in L&D to create a robust and meaningful measurement and reporting strategy, including
 - How to select measures
 - How to define and benchmark them
 - How to report and use them

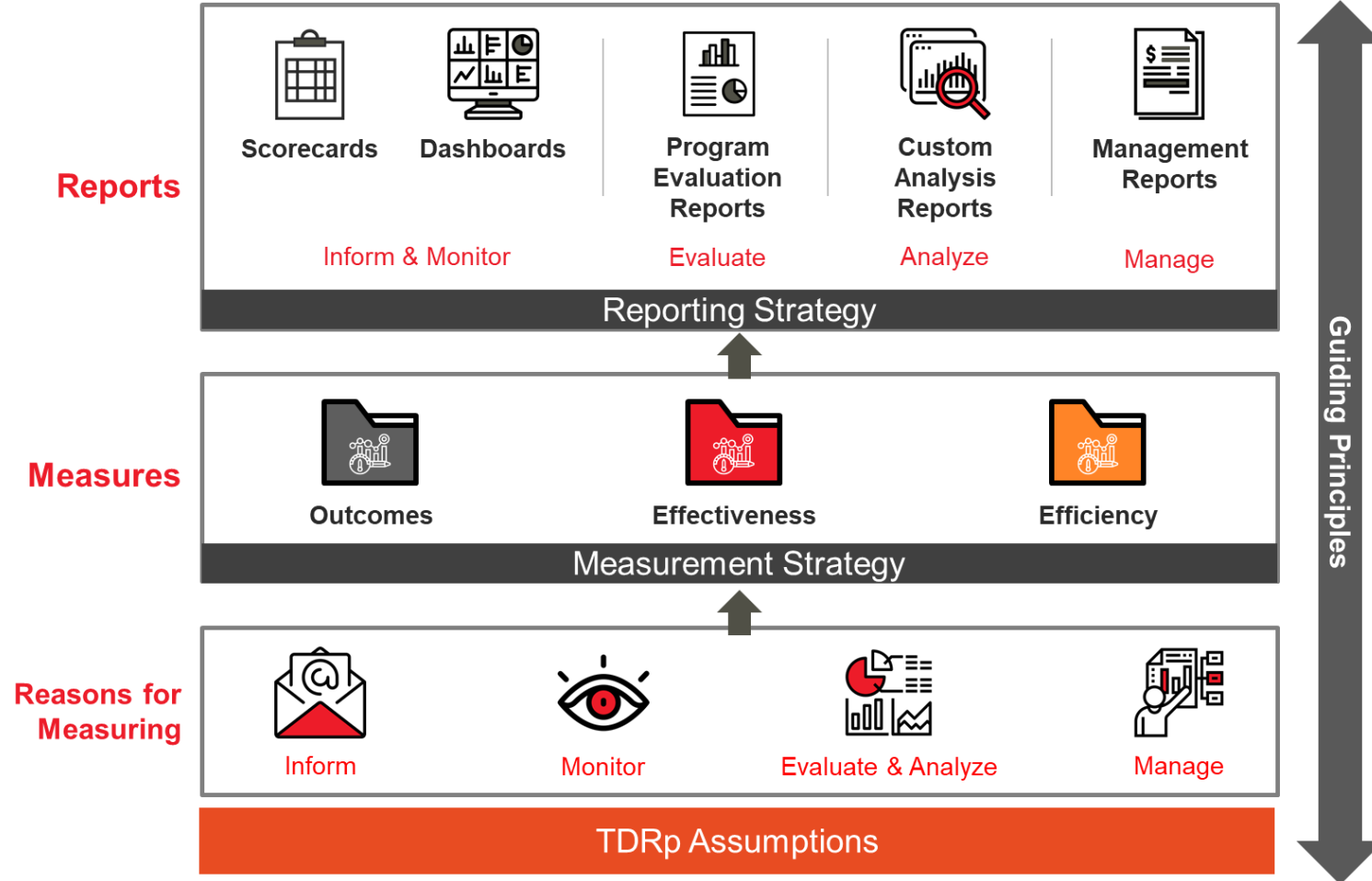
Measurement Demystified serves as a primer to those people just entering the talent development field. Beginning this journey knowing the best way to report talent development performance will help frame the measures taken for each program evaluation.

It also serves as a refresher for those who have been involved in designing standards around talent development reporting.

Finally, the book serves as a booster for those with advanced capability in measurement and analytics. It provides new insights to developing reporting strategies that effectively inform decisions about the talent development investment.

--Patti Phillips, Forward to Measurement Demystified

The TDRp Framework



What's in the book?

An easy-to-use guide

1. Talk to users to determine the reasons to measure
2. Use the reasons and type of program or initiative to select the right measures
3. Use the reason to measure to select the right report to share the measures
4. Use the guiding principles to stay on track



Reasons To Measure

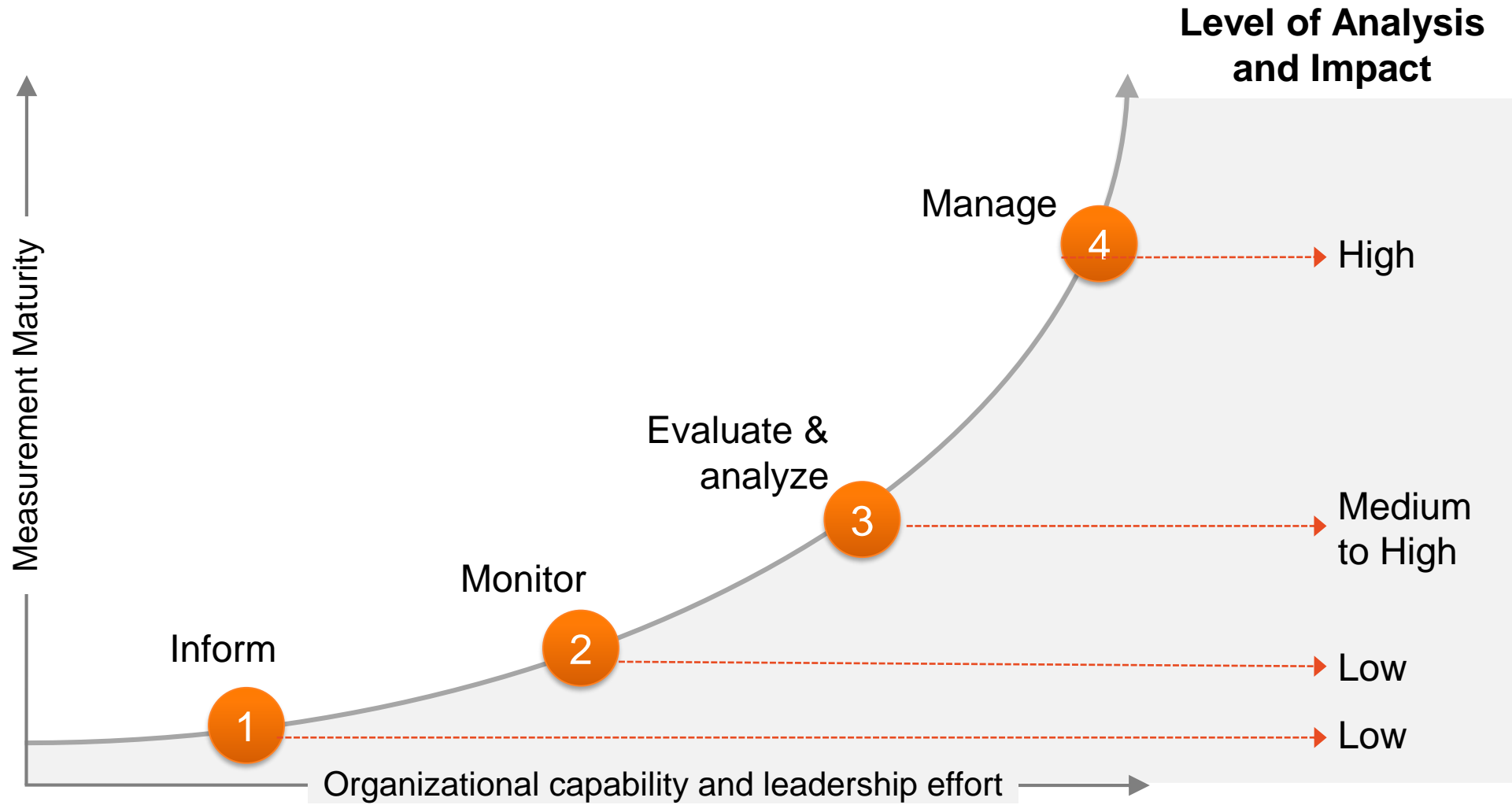
- The natural starting for any strategy
- Discover and incorporate the needs of the user
- Drives both measurement selection and type of report
- Reason-to-measure framework needs to be simple, easy to remember
- Although there are many reasons to measure, group into no more than four or five categories

Reasons To Measure



- **Inform** to answer questions, identify key trends, and share activity.
- **Monitor** to determine if measure meets threshold or is within acceptable range.
- **Evaluate** the efficiency, effectiveness, or impact of a learning program.
- **Analyze** program and non-program data; Explore relationships among measures; Predict outcomes
- **Manage** program to ensure they deliver planned results; identify adjustments needed to meet goals

Measurement Hierarchy



Poll #1

- In your organization, the primary reason to measure is
 - Inform
 - Monitor (with thresholds)
 - Evaluate programs
 - Manage programs (with plans/targets per measure)

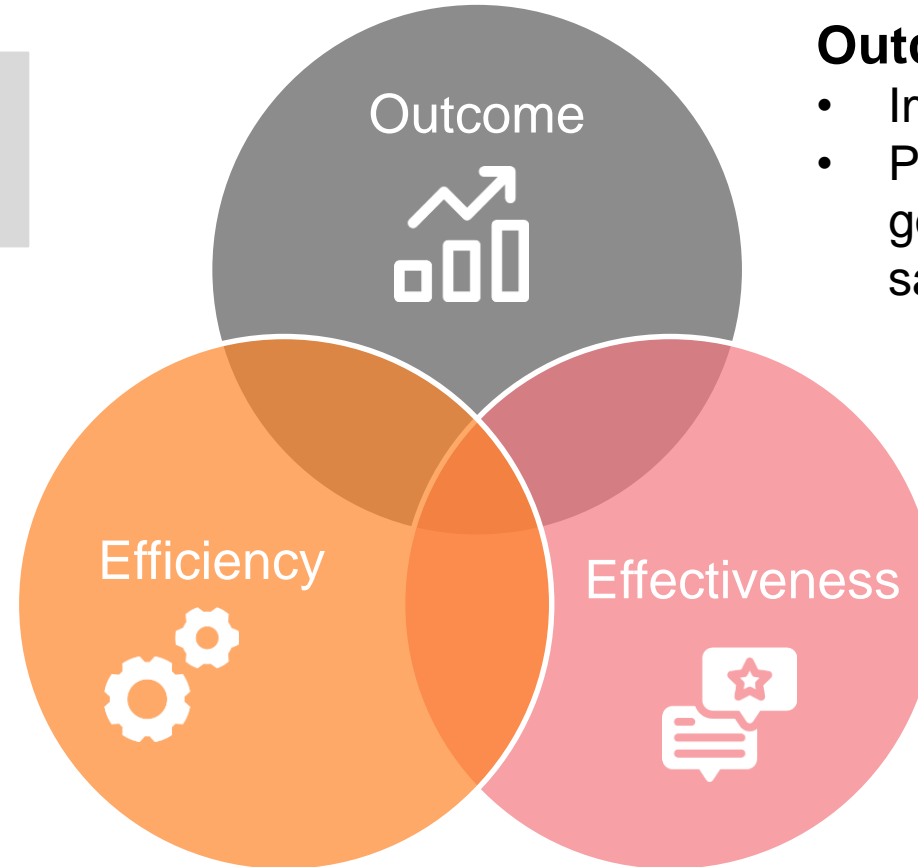
The Three Types Of Measures

What's in the book?

- Definitions of > 120 measures
- Guides to benchmarking by ATD and Explorance

Efficiency measures

- Quantity, volume, utilization, cost
- Number of participants, courses, hours, utilization rate



Outcome measures

- Impact of learning on org goals
- Phillips level 4: impact of learning on goals like sales, quality, customer satisfaction, employee engagement









Effectiveness measures

- Quality of program
- Kirkpatrick/Phillips Levels 1-5
- Participant reaction, learning, application, results or impact, ROI

Poll #2

- What types of measures does your organization use most of the time?
 - Predominantly efficiency measures
 - Mostly efficiency measures but also levels 1 and 2
 - Efficiency and effectiveness measures through level 3 application
 - Efficiency and effectiveness measures through level 4 impact and level 5 ROI

Selecting Your Measures

	Effectiveness	Efficiency	Outcomes	
Individual Programs				# participants, cost, completion rates
Aggregated across all Programs				# participants, cost, levels 1-3
Department Initiatives				Improve portal satisfaction
Program directly supports a high-level business or HR goal				Phillips level 4 isolated impact

Sample List Of Measures

By Measure

Measure	Program A	Program B	Program C	Department Wide
Unique participants	X	X	X	X
Total participants		X		X
Total cost	X	X	X	
Completion rate		X		
Percentage on-time completions		X	X	X
Reach				X
Direct expenditure				X

Measure	Program A	Program B	Program C	Department Wide
Level 1 participant reaction	X	X	X	
Level 1 goal owner reaction	X	X	X	X
Level 2	X	X	X	X
Level 3 intent and actual	X	X	X	X
Level 4 initial, final estimates			X	
Percentage of courses by modality				X
Number of documents available				X
Number of documents used				X
Percentage of documents used				X
Percentage of unique documents used				X

What's in the book?

Examples and guidance to select measures for:

- Strategic and non-strategic programs
- Initiatives to improve efficiency and effectiveness across all programs
- Initiatives to improve the efficiency and effectiveness of processes and systems like the LMS



The Important Role Of Reports

WHAT?

Important tools to guide decision-making, planning and insights about the business



WHY?

Provides users with the information they need to be informed, to monitor, to evaluate and to manage




HOW?

A reporting framework which identifies reports by type and ties each report to a specific reason to measure



Report Requirements



Measurement Purpose	Measurement Frequency	Key Elements	Shared In
Manage	Monthly	<ul style="list-style-type: none"> Plan YTD results Forecast for measures being managed 	<ul style="list-style-type: none"> Management reports
Evaluate and analyze	End of program or pilot	<ul style="list-style-type: none"> Six levels of evaluation (Level 0 to Level 5) 	<ul style="list-style-type: none"> Program evaluation reports
	Based on business need	<ul style="list-style-type: none"> Analytical methods (e.g. regression analysis, predictive modeling) 	<ul style="list-style-type: none"> Custom analysis reports
Monitor	Monthly or quarterly	<ul style="list-style-type: none"> Threshold or breakpoints for measures. 	<ul style="list-style-type: none"> Dashboards Scorecards
Inform	As needed	<ul style="list-style-type: none"> Specific measures or trends. 	<ul style="list-style-type: none"> Dashboards, Scorecards

Scorecards And Dashboards

- Both used to inform or monitor
- Many varieties. Typically, show only actual results



- **Scorecards:** detailed data typically by month, may include year to date data
- **Dashboards:** usually includes visual elements like graphs and year-to-date data
- Either may be used to monitor if thresholds are included

Typical Scorecard - Purpose: Inform

Unique Courses Used by Type of Learning

Meaure	Unit of Measure		Jan	Feb	Mar	Apr	May	Jun	Total Unique Courses YTD
ILT only	Number	ILT only	15	15	14	12	11	9	23
VLIT only	Number	VLIT only	1	1	2	2	3	3	3
E-learning only	Number	E-learning only	9	10	11	11	12	13	15
Blended	Number	Blended	<u>1</u>	<u>1</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>3</u>	<u>3</u>
Total courses			26	27	29	27	28	28	44

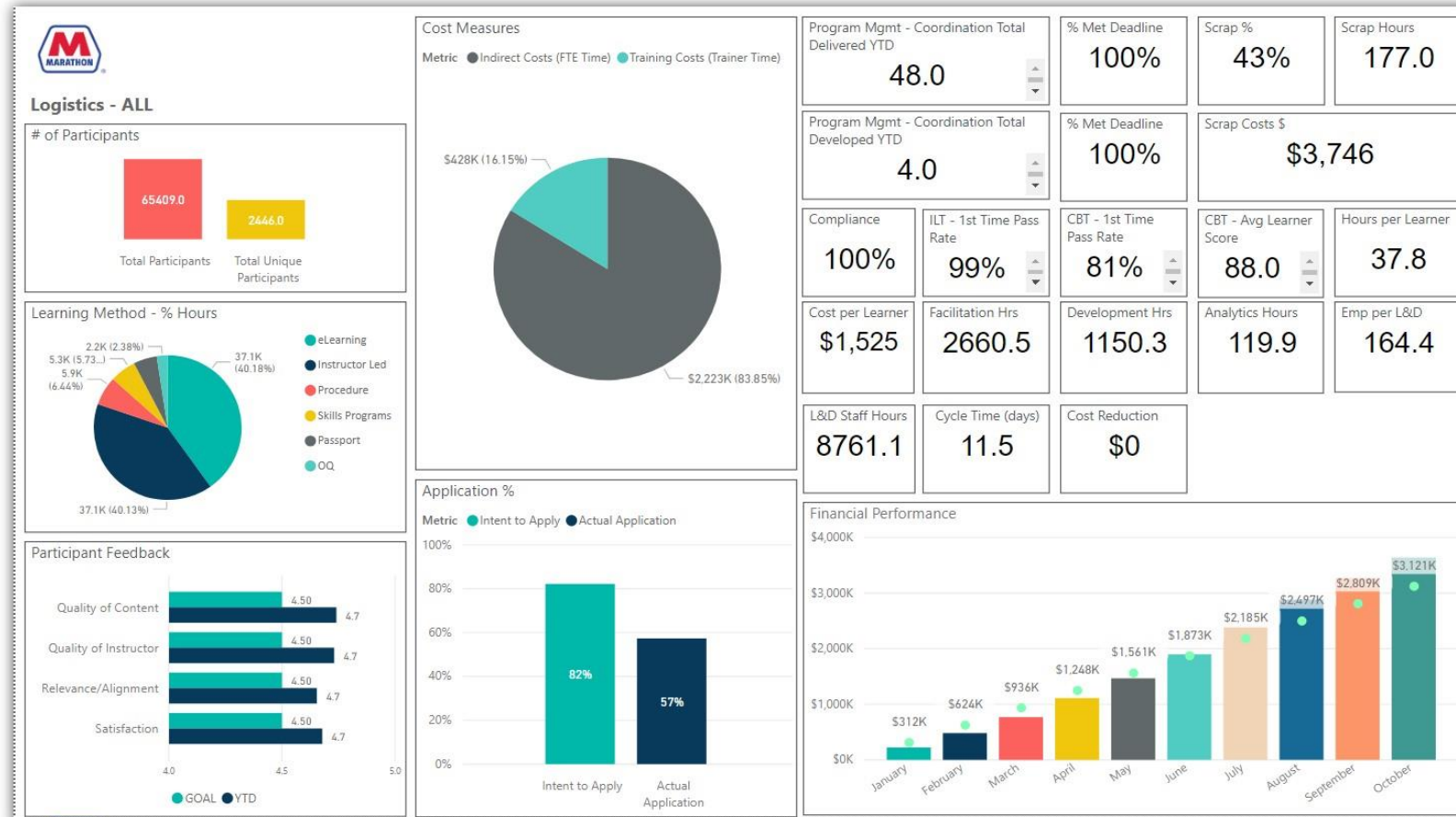
Meaure	Unit of Measure		Jan	Feb	Mar	Apr	May	Jun	YTD
ILT only	Number	ILT only	58%	56%	48%	44%	39%	32%	52%
VLIT only	Number	VLIT only	4%	4%	7%	7%	11%	11%	7%
E-learning only	Number	E-learning only	35%	37%	38%	41%	43%	46%	34%
Blended	Number	Blended	<u>4%</u>	<u>4%</u>	<u>7%</u>	<u>7%</u>	<u>7%</u>	<u>11%</u>	<u>7%</u>
Total courses			100%	100%	100%	100%	100%	100%	100%

Note: Since the table displays unique courses, the YTD total eliminates duplicates across months

Characteristics

- Raw data
- Often shows data over time; may show breakdowns by demographics
- No thresholds
- Spreadsheet format
- No data visualization

Typical Dashboard - Purpose: Inform



Characteristics

- Combination of summarized data and graphics
- May not have thresholds
- May have the ability for drill down

Typical Dashboard - Purpose: Monitor

Departmental Dashboard						Green	Yellow	Red
	JAN	FEB	MAR	APR	YTD			
Efficiency Measures								
LMS uptime (percent)	99.5%	98.0%	99.1%	99.4%	99.0%	>99%	97-99%	<97%
Help desk call time (minutes)	11.5	10.5	9.8	9.7	10.4	<10 min	10 min-20 min	>20 min
Help desk wait time (minutes)	2.2	0.8	1.6	2.3	1.7	<1 min	1 min-2 min	>2 min
Percentage on time completions (percent)		75.0%	79.2%	81.5%	78.6%	>90%	80-90%	<80%
Effectiveness Measures								
Level 1 Reaction: percent of top two boxes	75.0%	81.5%	82.0%	82.0%	80.1%	>80%	70-80%	<70%
Level 2 Learning: 1st time pass rate	79.0%	85.0%	90.5%	91.0%	86.4%	>90%	80-90%	<80%
Level 3 Application: percent of content applied			58.0%	61.5%	59.8%	>60%	40-60%	<40%

Characteristics

- Data includes color coding based on performance thresholds
- May have the ability to drill into the results

Program Evaluation Report - Purpose: Evaluation

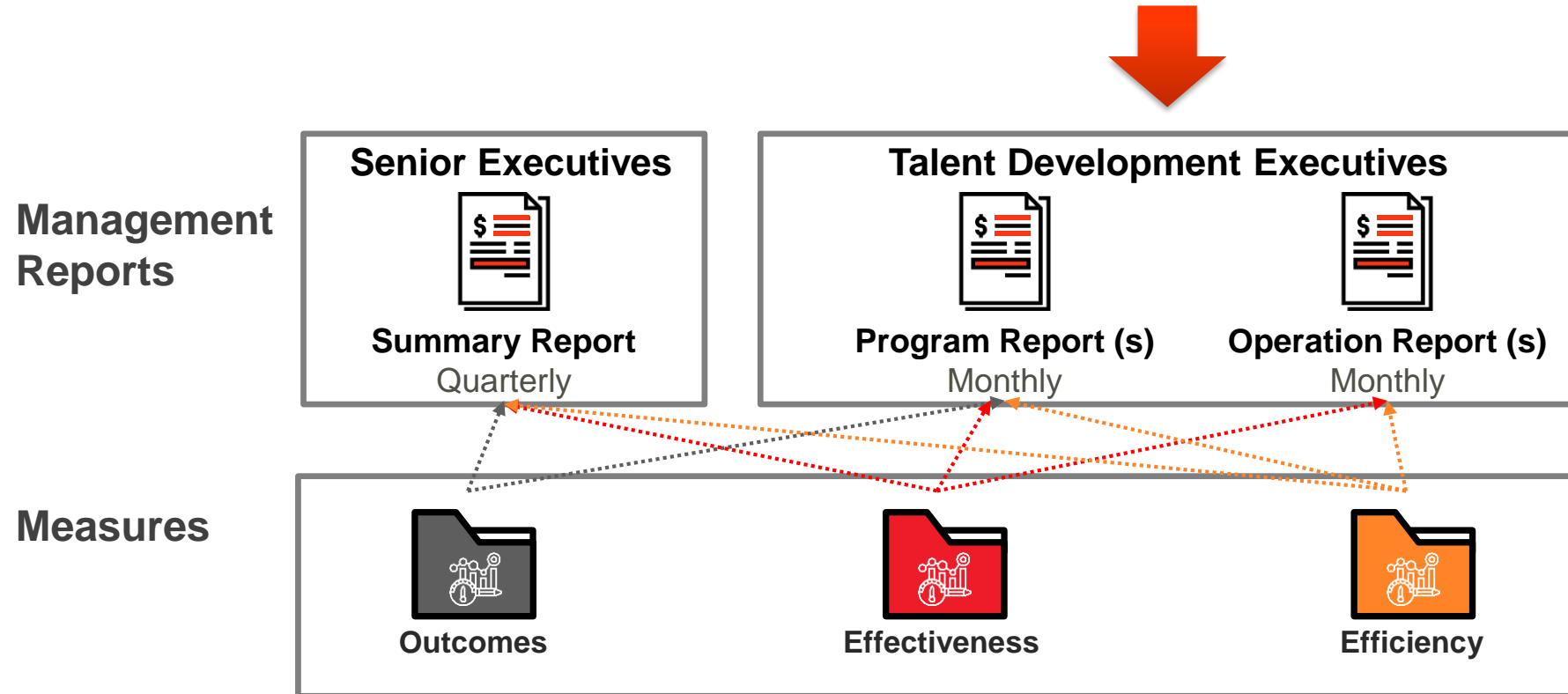
- One-off report to identify if a program was successful (Results or impact, ROI)
- PPT or Word doc including:
 - Context on program and its objectives
 - Expectations
 - Program results
 - Program impact
 - Lessons learned
 - Improvement recommendations

Sales Training Initiative: Impact, Lessons Learned & Recommendations

- Sales and learning department believe this initiative, including the effort by the sales supervisors to reinforce the learning and hold their reps accountable contributed at least **3 percent higher sales**
- This increase in sales resulted in additional **\$585,000 in gross profit**
- This program contributed **\$260,000 to net profit***
- The **ROI** was conservatively estimated at **80 percent**
- Lessons learned
 - Executive sponsorship and supervisor reinforcement is critical
 - Further gains from the learning are possible in 2020
 - Participant feedback provided numerous ideas for improvement
- Recommendations
 - Educate sponsors and supervisors on their role to reinforce learning
 - Identify best practices and reinforce them with the low performers

*After subtracting the costs associated with the training

Reports To Manage



TDRp Management Reports

- Designed to be used by leaders to manage programs and the department to deliver promised results
- Business centric; similar to reports used in sales, manufacturing and other departments
- Common elements
 - Plan or target
 - Year-to-date results and comparison to plan
 - Forecast and comparison to plan

What's in the book?

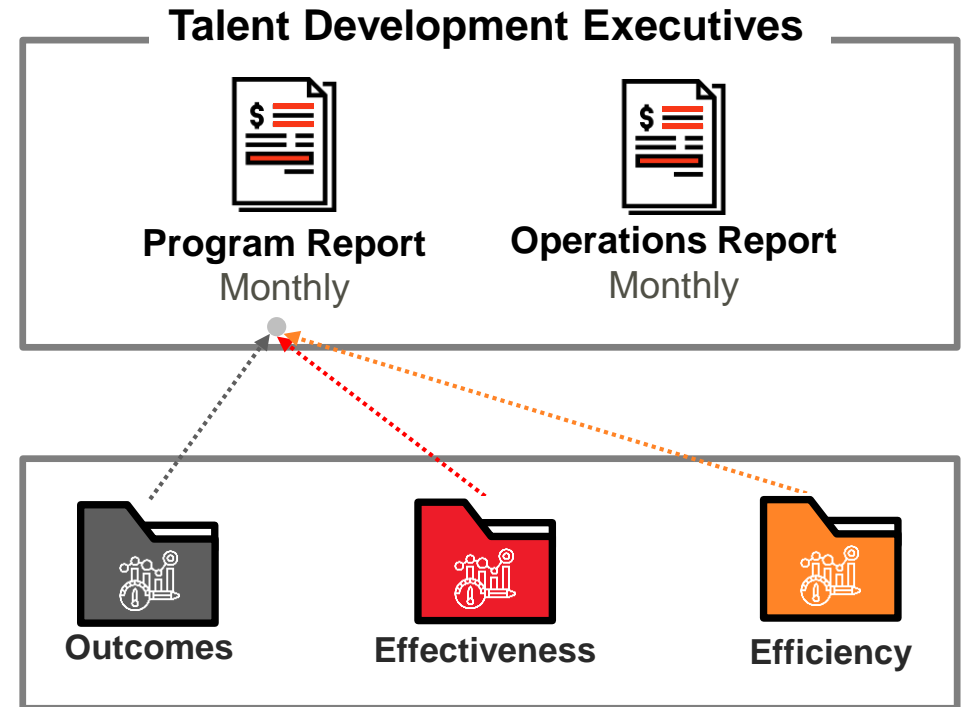
Detailed guidance and numerous examples on how to:

- Create plans or targets
- Use year-to-date results
- Create forecasts
- Format the reports



The Program Report

- Monthly report designed to provide the manager with what they need to manage a program to successful conclusion
- Includes:
 - All three types of measures
 - Information on the organizational goal



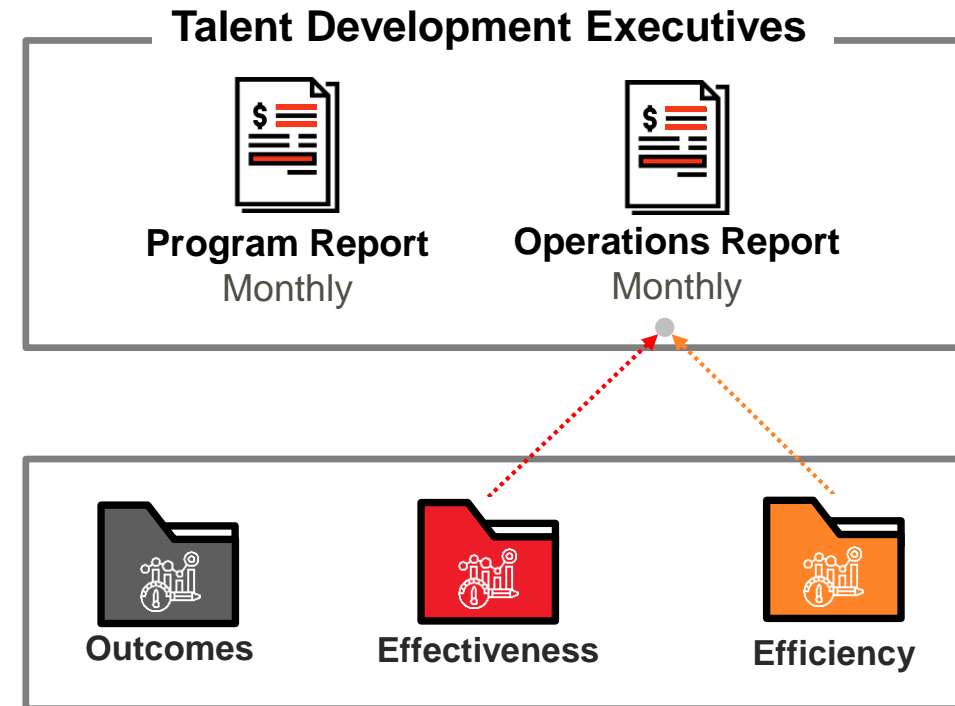
Program Report Example

Purpose: Manage the Program

		Results through August 2021					
		2020		YTD	YTD	Forecast	Forecast
		<u>Actual</u>	<u>Plan</u>	<u>YTD</u>	<u>Compared to Plan</u>	<u>Forecast</u>	<u>Compared to Plan</u>
Goal Owner: Swilthe, VP of manufacturing	Metric						
Enterprise Goal: Reduce Injuries	%	12%	20%	13%	7% below	20%	on plan
Impact of Learning on Injuries: 70% contribution planned for 2021	% reduction in injuries	NA	14%	9%	5% below	14%	on plan
<u>Program A (Deliver existing two courses to factory A)</u>							
Efficiency measures							
Unique Participants	Number	452	3,000	3,078	103%	3,200	107%
Total Participants	Number	858	6,000	6,067	101%	6,300	105%
Completion Rate (100% by March 31)	% complete, Date	NA	31-Mar	101%		105%	above plan
Effectiveness measures							
Level 1: Participant Reaction	% favorable	70%	80%	85%	5% above	82%	2% above
Goal Owner Reaction	5-point scale	3.8	4.5	4.3	.2 below	4.3	.2 below
Level 2: Learning	% first-time pass rate	86%	90%	95%	5% above	92%	2% above
Level 3: Intent to Apply	% content applied	53%	95%	87%	7% below	95%	on plan
Actual Application	% content applied	39%	90%	87%	3% below	90%	on plan

The Operations Report

- Monthly report to help the CLO manage key measures for
 - Measures across all programs (like increasing the application rate)
 - Measures for initiatives to improve internal processes and systems or other initiatives



Example Of An Operations Report

Purpose: Manage Initiatives Across All Programs

	2020	2021					
		Unit of Measure	Actual	Plan	Jun YTD	YTD Compared to Plan	Forecast
<u>Efficiency Measures</u>							
Total Participants	Number	7,689	9,000	4,390	49%	9,000	100%
Total Unique Participants	Number	24,567	36,000	15,467	43%	34,000	94%
Percentage of Courses Meeting Deadline for Development	%	68%	90%	78%	12% below	85%	5% below
Percentage of Courses Meeting Deadline for Delivery	%	59%	90%	72%	18% below	82%	8% below
Reach (% of employee reached by L&D)	%	85%	88%	72%	16% below	88%	on plan
<u>Effectiveness Measures</u>							
Level 1: Participant Reaction (All programs)							
Quality of content	% favorable	76%	80%	79%	1% below	79%	1% below
Quality of instructor	% favorable	80%	85%	86%	1% above	85%	on plan
Relevance	% favorable	72%	78%	73%	5% below	75%	3% below
Recommend to others	% favorable	68%	75%	69%	6% below	71%	4% below
Total for Level 1	Average of measures	74%	80%	77%	3% below	78%	2% below
Level 1: Goal Owner Reaction (Select programs)							
	% favorable	66%	80%	68%	12% below	75%	5% below
Level 2: Learning (Select programs)							
	Score	78%	85%	83%	2% below	85%	on plan
Level 3: Application Rate (Select programs)							
Intent to apply (from post-event survey at end of course)	% content applied	70%	75%	70%	5% below	72%	3% below
Actual application (from follow-up survey after three months)	% content applied	51%	65%	55%	10% below	63%	2% below

Poll #3

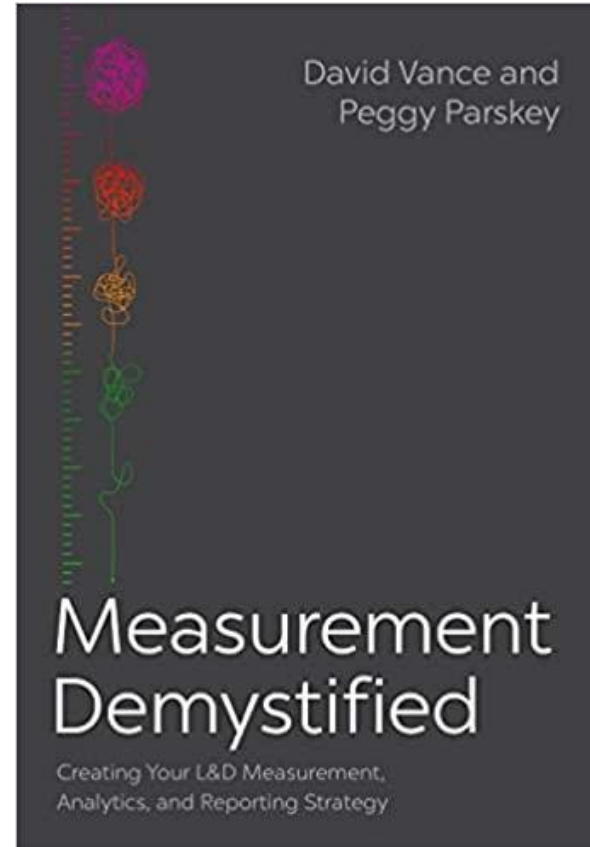
- In our organization we use
 - A. Scorecards and dashboards
 - B. “A” plus some program evaluation reports
 - C. “B” plus monthly management reports

Topics Covered In The Book

- Part 1: Foundations of Measurement
 - Ch 1: Talent Development Reporting Principles
 - Ch 2: Introduction to basic measures
- Part 2: Measurement
 - Ch 3: Efficiency measures
 - Ch 4: Effectiveness measures
 - Ch 5: Outcome measures
 - Ch 6: Creating a measurement strategy
 - Ch 7: Selecting measures
- Part 3: Reporting
 - Ch 8: Reporting Overview
 - Ch 9: Three management reports
 - Ch 10: Creating your reporting strategy
 - Ch 11: Creating plans
 - Ch 12: Reporting year-to-date results and making forecasts
- Part 4: Putting it All Together
 - Ch 13: Implementing Measurement & Reporting
 - Ch 14: Summary and Conclusions
- Appendices

Conclusion

- Measurement Demystified: designed to provide a framework and practical guidance
 - Define, select, and use measures
 - Define, select and use the right reports
- Available on Amazon and ATD



Amazon Quotes

- “Welcome to the definitive guide to measurement and reporting for L&D. This is a tool more than a book. With over 400 pages of keen insights and analysis, you will find solutions and strategies in these pages immediately applicable to organizational learning initiatives.”
- “All I can say is WOW! This is the ultimate playbook to help learning leader and teams finally speak the language of the business, ensure their initiatives are aligned with outcomes and prove that learning can be a game changer for success.”

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THANK YOU!