"However beautiful the strategy, you should occasionally look at the results."

~~ Winston Churchill
9) In general, are you able to do the learning measurement you want to?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes.</td>
<td>20.9%</td>
</tr>
<tr>
<td>No - I wish we could measure FEWER of our learning interventions.</td>
<td>1.1%</td>
</tr>
<tr>
<td>No - I wish we could do measurement that is EASIER TO DEPLOY (less rigorous/extensive).</td>
<td>8.3%</td>
</tr>
<tr>
<td>No - I wish we could measure MORE of our learning interventions.</td>
<td>19.6%</td>
</tr>
<tr>
<td>No - I wish we could do BETTER measurement (more rigorous/extensive/meaningful).</td>
<td>51.0%</td>
</tr>
</tbody>
</table>

Figure 63 – Are you able to do the measuring you want to do (all members)?

WHERE ARE WE TODAY?
4 trends affect analysis and evaluation

1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support
4 trends affect analysis and evaluation

1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support

Technology alters delivery

- Forty-two percent of organizations anticipate decreasing classroom learning
- Seventy-two percent intend to increase their asynchronous e-learning.

[Chief Learning Officer's Business Intelligence study]
4 trends affect analysis and evaluation

1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support
What CEOs Measure

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Description</th>
<th>“of greatest concern”</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sustained and steady top-line growth</td>
<td>37.5%</td>
</tr>
<tr>
<td>2</td>
<td>Profit growth</td>
<td>36.1%</td>
</tr>
<tr>
<td>3</td>
<td>Consistent execution of strategy by top management</td>
<td>33.4%</td>
</tr>
<tr>
<td>4</td>
<td>Speed, flexibility, adaptability to change</td>
<td>33.1%</td>
</tr>
<tr>
<td>5</td>
<td>Customer loyalty / retention</td>
<td>29.4%</td>
</tr>
<tr>
<td>6</td>
<td>Stimulating innovation / creativity / enabling entrepreneurship</td>
<td>23.9%</td>
</tr>
<tr>
<td>7</td>
<td>Corporate reputation</td>
<td>22.9%</td>
</tr>
<tr>
<td>8</td>
<td>Speed to market</td>
<td>22.7%</td>
</tr>
<tr>
<td>9</td>
<td>[Product] Innovation</td>
<td>20.8%</td>
</tr>
<tr>
<td>10</td>
<td>Improving productivity</td>
<td>20.3%</td>
</tr>
</tbody>
</table>

Source: The Conference Board

What We Measure—WHEN we measure

Percentage of Courses Evaluated at Each of Kirkpatrick’s Four Levels

Level 1 Reaction: 94%
Level 2 Learning: 34%
Level 3 Behavior: 13%
Level 4 Results: 3%

Source: "Restructuring: Results From the ASTD Benchmarking Forum"
The casinos LOVE data

- Constant measurement against a few targets
- Use of data to anticipate needs and target services

Evidence at the center of practice?

- New targets or “evaluands”
- Quest for triangulation
- Preference for numbers AND stories
- Pervasive metrics to enlighten decisions
  - Convergence of analysis and evaluation

Doubt it?
Imagine an ethics program….

- Anchor blend, based on F2F class
- Decision support tool to help decide action
- Push reminders online
- Leader podcasts
- E-coach
- Anonymous report line

Let’s be inquisitive about that program

- Outcome indicators? Lawsuits? Early warnings?
- Which assets are used? Which not? Why? Reactions to coaches and tool? Helpful?
- Anonymous survey about barriers to ethical choices, unresolved concerns
- Dashboard that rolls up results
1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support

Delivering support into work

- Coast Guard boarding officers must know about many vessels
- Unacceptable error rate; costly training
- Now they use a blend, a short course plus PDA to inspect and report
Kirkpatrick’s model is good. Is it sufficient?

<table>
<thead>
<tr>
<th>Level 4:</th>
<th>Does it matter? Does it advance strategy?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 3:</td>
<td>Are they doing it (objectives) consistently and appropriately?</td>
</tr>
<tr>
<td></td>
<td>+++++++++++++++++++++++++++++++++++</td>
</tr>
<tr>
<td>Level 2:</td>
<td>Can they do it (objectives)? Do they show the skills and abilities?</td>
</tr>
<tr>
<td>Level 1:</td>
<td>Did they like the experience? Satisfaction? Use? Repeat use?</td>
</tr>
</tbody>
</table>

More purposes....
Workplace learning/support

More purposes

Matched methods

More Purposes

• To plan
• To report
• To improve
Purposes—linked to planning

1. To match participants to what they really need
2. To examine alignment, querying the transfer and performance system
3. To find out if the right information and worked examples are delivered on demand
4. To identify emergent needs, problems and opportunities and plan responses

Purposes—linked to reporting

5. To fulfill promises to regulatory and government agencies
6. To determine contributions to business outcomes
7. To contribute to talent management via programs/results that attract and retain
8. To advance the careers of our people
9. To tally all that we do and how much it is worth to the organization

Levels 0-5
Purposes—linked to improving

10. To improve upon our efforts, programs and the work of instructors/facilitators
11. To determine if learning happened
12. To determine how engaged our people are with their development, including contributions to networks and communities

Web 2.0

PLEASE look at the 12 purposes and rate each for an important initiative. Lean manufacturing? New supervisors? Selling higher in the organization? Ethics?

Top priority

Some priority

No priority
<table>
<thead>
<tr>
<th>Purposes</th>
<th>Purposes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. To match participants to what they really need</td>
<td>7. To contribute to talent management via programs/results that attract and retain</td>
</tr>
<tr>
<td>2. To examine alignment, querying the transfer and performance system</td>
<td>8. To advance the careers of our people</td>
</tr>
<tr>
<td>3. To find out if the right information and worked examples are delivered on demand</td>
<td>9. To tally all that we do and how much it is worth to the organization</td>
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<tr>
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<td>10. To improve upon our efforts, programs and the work of instructors/facilitators</td>
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<tr>
<td>6. To determine contributions to business outcomes</td>
<td>12. To determine how engaged our people are with their development, including contributions to networks and communities</td>
</tr>
</tbody>
</table>

YOUR RATINGS?

Any surprises?
You can’t tackle all the purposes.

This was a project for a mutual fund company. Two years prior they had launched an initiative to convert 45 trainers to performance consultants. Now they want to know how it’s going. What are their purposes? No, they can’t pursue all 12. No time, few resources.

- To match participants to what they really need
- To examine the transfer and performance system
- To determine contributions to business outcomes

How to find out “how it was going”

I limited my purposes. What methods then?

- To match participants to what they need
  - Anonymous online survey for 45 consultants seeking their assessment of skills and knowledge associated with performance consulting. Seek confidence to perform.
  - Interview consultants about lingering questions, and barriers what they require to deliver on change in their roles
  - Interview randomly selected customers. What did they handle well? What not so well?

- To determine contributions to business outcomes
  - Interview randomly selected customers. What were they seeking when they came to us? What business results? What indicators would signify success? Measure.
  - Repeat requests from customers? Better framed requirements?

- To examine the transfer and performance system
  - In anonymous online survey for consultants, include a question about drivers/blockers. What would help them move forward to deliver on this new role?
  - Interview consultants’ supervisors regarding what drives/blocks performance
  - Look at the performance mgmt system. Has it changed with the new roles?
  - See Brinkerhoff SCM
### Use purposes to plan methods

<table>
<thead>
<tr>
<th>Purposes</th>
<th>Sources</th>
<th>Questions</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>To see if learning occurred</td>
<td>Supervisors, Customers, Records</td>
<td>How would you handle this? (assessments, tests)</td>
<td>Test scores, Error rate, Call backs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Can you ID errors?</td>
<td>Customer sat, Speedy completion</td>
</tr>
<tr>
<td>To determine contributions to</td>
<td>Executives, Managers, Strategy</td>
<td>What do you expect? What indicators would</td>
<td>Error rate, Call backs, Customer sat</td>
</tr>
<tr>
<td>business outcomes</td>
<td>docs, See Spitzer LEM</td>
<td>satisfy? Delight?</td>
<td>Speedy completion, Tailored indicators</td>
</tr>
<tr>
<td>To see if we contribute to</td>
<td>Employees, Potential employees,</td>
<td>Why did you join us? Why are you departing?</td>
<td>Recruitment, Retention rate,</td>
</tr>
<tr>
<td>talent management</td>
<td>HR, managers</td>
<td>How do you perceive learning offering?</td>
<td>Employee satisfaction, Engagement</td>
</tr>
<tr>
<td>To see if we advance the</td>
<td>Participants, peers, Supervisors,</td>
<td>Where to from here for you? What more must</td>
<td>Are career paths specified? Increase</td>
</tr>
<tr>
<td>careers of our people</td>
<td>HR colleagues, Perf mgmt system</td>
<td>you know and do? Do you know how to move</td>
<td>in promotions from within? Retention</td>
</tr>
<tr>
<td></td>
<td></td>
<td>forward?</td>
<td>up?</td>
</tr>
</tbody>
</table>

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**My Marble Model**

- **M** More data, more sources, more often
- **A** Actionable: PLAN, REPORT, IMPROVE
- **R** Repurposing methods, data
- **B** Baked in— as you build programs
- **L** Lean, based on smaller bites of data
- **E** Everywhere learning, support & info are
<table>
<thead>
<tr>
<th>Useful links, I hope</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SDSU Encyclopedia of Educational Technology</td>
<td><a href="http://coe.sdsu.edu/eet/">http://coe.sdsu.edu/eet/</a></td>
</tr>
<tr>
<td>SDSU EDTEC graduate programs</td>
<td><a href="http://edweb.sdsu.edu/Edtec/distance/">http://edweb.sdsu.edu/Edtec/distance/</a></td>
</tr>
<tr>
<td>A social network devoted to non-training interventions</td>
<td><a href="http://www.pinotnet.ning.com">www.pinotnet.ning.com</a></td>
</tr>
<tr>
<td>Pithy video introductions to Web 2.0 strategies</td>
<td><a href="http://www.commoncraft.com/show">http://www.commoncraft.com/show</a> scroll down</td>
</tr>
</tbody>
</table>

**ALLISON ROSSETT**
Professor of Educational Technology, San Diego State University
Rossett has devoted her career to the development of training and technology professionals with a focus on e-learning and needs assessment. She is a consultant in training and technology-based performance. Rossett received ASTD’s Distinguished Contribution to Workplace Learning and Performance Award in 2002. She recently wrote Job Aids and Performance Support: Moving from Knowledge in the Classroom to Knowledge Everywhere. She also has written The ASTD E-Learning Handbook.

**Q: WHERE DO YOU ENVISION E-LEARNING GOING IN THE FUTURE?**
The focus of e-learning is moving out of the classroom and into the workplace. Many experts believe that the classroom is not essential to training and development today, and is growing more in the future. For example, in some cases, the classroom has moved online, from there distant users for the future of learning.

The first is the technology. We will gather more data from more sources in unstructured and small-granular files. That’s a consequence of unstructured data. The second is blended learning, which involves a combination of approaches to reach a goal teaching individually or in a group, in a classroom, or slide presentations and workshops, or through e-learning. The third is the technology. The danger occurs when the employee doesn’t keep things up to date, the knowledge base, doesn’t follow the e-learning advices, and doesn’t take advantage of an e-course. It is partly because of the distance to work, its technical nature, and because it’s quality of mind.

E-learning is a technology-based performance system that engages around people and helps them answer questions and make better decisions without going to school or the topics. The change is the EPS performance support to e-learning. The EPS performance support helps our students to learn more and do less. The change is the EPS performance support that engages around people and helps them answer questions and make better decisions without going to school or the topics. The change is the EPS performance support to e-learning. The EPS performance support helps our students to learn more and do less. People use them when in need, not so moving from knowledge in the classroom to knowledge everywhere.

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## Job Aid— Purposes → Methods

<table>
<thead>
<tr>
<th>Purposes</th>
<th>Sources</th>
<th>Questions</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus on your project. What purposes are</td>
<td>Triangulate. Go to many sources, including</td>
<td>Ask in several ways, in general, and then through specifics.</td>
<td>What vivid outputs, numbers, deliverables would satisfy the client? You?</td>
</tr>
<tr>
<td>germane?</td>
<td>incumbents and work products.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example below…. A key sales exec wanted to</td>
<td>He went to a conference and encountered “2.0”</td>
<td>The learning team immediately put in place sales community blogs and a</td>
<td>How to improve? How to plan to achieve sales goals? This example starts by</td>
</tr>
<tr>
<td>encourage global “sharing”</td>
<td>and is now pushing for it.</td>
<td>series of podcasts that capture ideas.</td>
<td>looking at engagement.</td>
</tr>
<tr>
<td>To determine how engaged our people</td>
<td>Sales people; sales supervisors; work</td>
<td>Use numbers. How much? How widespread? Do they return over time? Opinion</td>
<td>Is the blog up to date? Is it widely used? Do presentations and proposals</td>
</tr>
<tr>
<td>are with their development, including</td>
<td>products (presentations, proposals, blogs)</td>
<td>data. How useful? Do they repurpose ideas and tailor to their needs?</td>
<td>reflect ideas found there? Are podcasts downloaded? Does discussion follow?</td>
</tr>
<tr>
<td>networks and communities</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Dr. Allison Rossett, long time professor of Professor of Educational Technology at San Diego State University, is in the Training magazine Hall of Fame, CLO Advisory Board, US Army’s Distance Learning Advisory Board, and Elearning Guild’s Board too. Rossett has authored six books, including a brand new edition of her classic, *First Things Fast: a handbook for performance analysis*. Allison writes about and consults on learning, technology and results.

You can reach Allison at arossett@mail.sdsu.edu

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