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Measuring Results From Training

ABSTRACT

Although we all know that training can have many amazing benefits, sometimes it can be hard to prove those benefits with a dollar value to training. Some topics, like sales training or time management, might have direct, tangible benefits. Other topics, like communication or leadership, might have benefits that you can't put a dollar value on.

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Suffer now and live the rest of your life as a champion.
Muhammad Ali

Preface

Although we all know that training can have many amazing benefits, sometimes it can be hard to prove those benefits and attach a dollar value to training. Some topics, like sales training or time management, might have direct, tangible benefits. Other topics, like communication or leadership, might have benefits that you can't put a dollar value on. In this book, we will learn about the different ways to evaluate training progress, and how to use those results to demonstrate the results that training brings.

I hear, I forget.
What I see, I remember.
What I do, I understand.
Confucious

Chapter One: Kolb's Learning Styles

In order to train individuals effectively, the trainer must understand that there are four ways that an individual can learn. Although each individual has a preferred style, all four elements must be included for learning to be effective. This module will look at David Kolb's four stage learning process and the four related styles of learning.

The Four-Stage Process

A learner's experience begins with Concrete Experience – things that happen to that individual. The individual then observes the situation, making Reflections and Observations. Next, the individual thinks about what has happened and develops Abstract Concepts. Finally, the individual Actively Experiments with those new ideas, leading to new Concrete Experiences – and the cycle begins all over again.

It is important to remember that this cycle occurs any time learning is required, whether it is learning how to use a new dishwasher at home, learning a new computer program, or trying to train your dog.

Now let's look at Kolb's four learning styles and see how they fit in with the learning cycle.

Kolb's learning cycle looks like this:
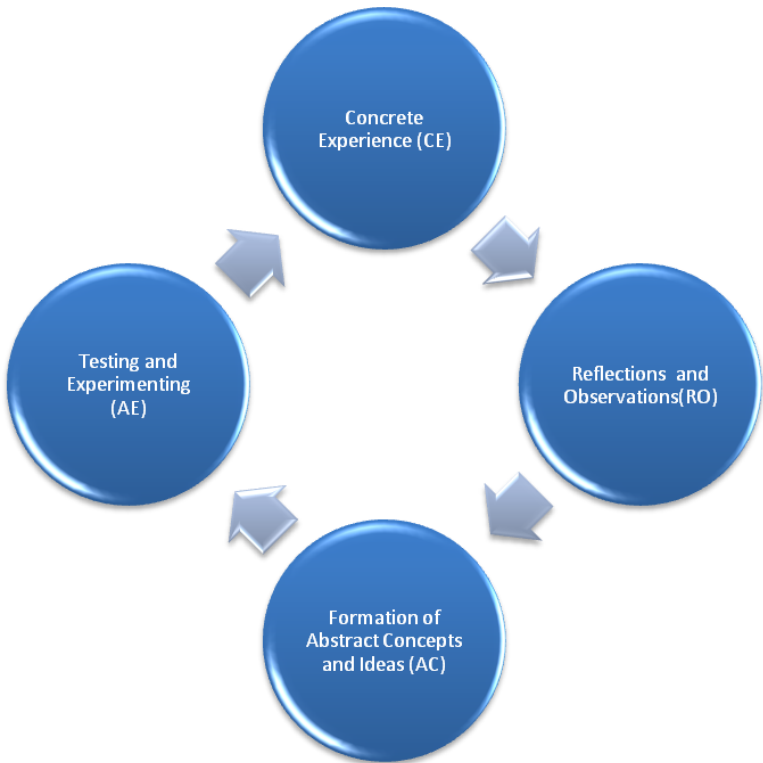
Accommodators

Accommodators are best at concrete experience and active experimentation. These are the people that are often the first to take risks, try new things, and carry out plans. This style of learning is often found in action-oriented, problem-solving jobs, like marketing, sales, and business.

Accommodators:

- Are good with people

- Can be seen as impatient and demanding because they are so eager to solve the problem

- Adapt well to new situations

- Use trial and error, intuition, and people resources rather than logic

- Do not become attached to a particular plan and will change when required

Divergers

Divergers are best at concrete experience and reflective observation. These are the people that can view all sides of the problem and bring all information together into a cohesive picture. Divergers are often found in the arts, cultural pursuits, and humanitarian efforts.

Divergers:

- Are good at generating ideas and are useful in brainstorming sessions

- Are typically creative, imaginative, and emotional

- Are interested in people

- Are organized and logical (although not necessarily in a linear way)

Convergers

Convergers are best at abstract conceptualization and active experimentation. This group is best at applying practical ideas. They work best in situations where there is a single correct answer to a question or situation. Convergers are often found in the physical sciences, such as engineering or biology.

Convergers:

- Organize knowledge into hypotheses to identify specific problems, and then use deductive reasoning to arrive at an answer for those problems

- Are relatively unemotional

- Prefer to deal with people rather than things

- Have narrow interests

- Do not like to move outside their comfort zone.

Assimilators

Assimilators are best at abstract conceptualization and reflective observation. This style of learning is often found in basic mathematical and scientific disciplines.

Assimilators tend to be:

- Less concerned with people

- Good at building straw models

- Good at inductive reasoning (bringing various observations into a single explanation)

- Interested in abstract concepts more than people

- More concerned with the theory being logical than its practical uses

Practical Illustration

Peter ran around in circles, trying to figure out how to help each of his trainees. Peter couldn't make heads or tails of how to choose just one style of teaching. Everyone had a different learning style. Peter felt like he constantly had to change hats. First, he wore one hat, then, he wore another. No two people in the room were benefiting from the same teaching method. Peter needed a break. He'd run for miles in less than one hour already. Nick pitched in to help. He pulled Peter aside, offering a wealth of advice to get Peter through the rest of the meeting unscathed. Nick's advice set off a round of fireworks. Peter had a revelation. Nick's solution solved Peter's problems in a flash.

Knowledge is learning something every day. Wisdom is letting go of something every day.
Zen Proverb

Chapter Two: Kirkpatrick's Levels of Evaluation

A good evaluation will cover all four dimensions of learning. This chapter will give you an overview of Donald Kirkpatrick's four levels of evaluation, which correspond loosely to Kolb's four learning stages.

Overview

Kirkpatrick's evaluation model measures four elements:

Each level is based on the level before it, so in order to achieve results; participants must have a positive experience with the first three levels.

Level One: Reactions

The most basic level of evaluation is the participants' reactions to the training.

- Did they like or dislike the training and the trainer?

- How did they feel about the training environment?

- Did they think the training was useful?

- Did they feel comfortable?

- Did they feel they had ample opportunities to participate?

This level can be measured with a few simple tools:

- Verbal feedback during and immediately after the workshop

- Subjective questionnaires during and immediately after the workshop, such as happy sheets (where participants circle a happy face or sad face for each question)

Reaction feedback is fairly easy to gather and measure. It should be gathered as close as possible to the desired time period. (For example, if you wanted to measure reactions to the first day of a workshop, you should gather reactionary feedback at the end of the first day.)

Level Two: Learning

The next level of evaluation assesses how much the participant learned. It looks at two basic areas:

- Did trainees learn what we wanted them to learn?

- Was the training experience what we wanted it to be?

This level is typically measured via tests immediately before and immediately after the training. It is important that these assessments are tied closely to the learning objectives.

Note that this level can be measured on an individual or group level. For example, you could have a verbal group-style quiz, or you could have individual assessments. When assessing group performance, however, make sure that each individual can be evaluated.

Level Three: Behavior

This level evaluates how much trainees applied the learning and changed their behavior after the training. Key questions should include:

- How quickly did trainees put their knowledge into effect back on the job?

- Were skills used correctly and relevantly?

- Was the behavior change sustained?

- Is the trainee aware of how they have changed?

- Would the trainee be able to share their knowledge with another person?

It can be challenging to evaluate changes at this level, particularly with soft topics like communication and leadership. It is important to develop a well-rounded, accurate evaluation system before training begins. Trainees will need to be evaluated on an ongoing basis in a way that is not intrusive on their daily duties. Tools like case studies, 360 degree feedback, and self-assessments can be useful as long as they are well-designed, consistent, objective, and appropriately timed.

Level Four: Results

The final level of evaluation is quantifiable results. This assesses the effect of the training on the person's environment (their workplace, home, etc.). These are typically measurements that are in place via normal business systems, such as:

- Number of sales

- Percentage of customer complaints

- Timeliness

- Absenteeism

- Quality ratings and failures

- Third-party inspection ratings (such as food and safety)

This is an important level of evaluation as it is often what high-level executives look for when evaluating the training. They want to know numbers and figures, with proof to back the data up.

These evaluation processes should tie in with day to day business procedures and not cause a lot of extra work. It is important, however, that the trainee knows what measurements are tied to the training before the training begins. This will help them apply context to the training and achieve better results.

As a final note, be careful of outside factors that can cloud ratings. For example, let's say that you send your salespeople on training and you expect their sales to increase by 5% per month as a result. If the economy crashes two months after the training, your results will be clouded by outside circumstances.

Practical Illustration

Joanna scribbled down the survey, not looking at the answer choices. Hugh chomped at the bit, waiting for her to complete the evaluation. She checked off boxes blindly. Sweat spilled from Hugh's brow. Joanna's ambivalence rubbed him the wrong way. Hugh stopped Joanna to ask why she didn't read the survey. Joanna waved him off. She had a litany of things to get done. Hugh begged her to read the entire survey. Joanna pondered that for a moment. Hugh waited with baited breath. Joanna weighed the pros and cons. Hugh pleaded. Joanna threw her hands in the air. She decided to rewind and start at the beginning. She read word for word and quickly changed her answers. Hugh breathed a sigh of relief. He wanted honest answers. Joanna apologized and patted herself on the back for taking a moment to review her answers.

The only real mistake is the one from which we learn nothing.
John Powell

Chapter Three: Types of Measurement Tools

In the previous chapter, we talked about how evaluation should take place at four different levels. In order to effectively evaluate each level, you will need a variety of tools. In this chapter, we will learn about some different types of measurement tools that can help you effectively evaluate results.

Goal Setting

Individual goal setting is an excellent way to measure behavior and results. Trainees should set goals during the workshop and then evaluate their progress at pre-determined intervals afterwards.

In order for goals to be effective, make sure they follow the SMART acronym:

- **Specific:** Success coach Jack Canfield states in his book The Success Principles that, "Vague goals produce vague results." In order for you to achieve a goal, you must be very clear about what exactly you want. Often creating a list of benefits that the accomplishment of your goal will bring to your life, it will give your mind a compelling reason to pursue that goal.

- **Measurable:** It's crucial for goal achievement that you are able to track your progress towards your goal. That's why all goals need some form of objective measuring system so you can stay on track and become

motivated when you enjoy the sweet taste of quantifiable progress.

- **Achievable:** Setting big goals is great, but setting unrealistic goals will just de-motivate you. A good goal is one that challenges, but is not so unrealistic that you have virtually no chance of accomplishing it.

- **Relevant:** Before you even set goals, it's a good idea to sit down and define your core values and your life purpose because it's these tools which ultimately decide how and what goals you choose for your life. Goals, in and of themselves, do not provide any happiness. Goals that are in harmony with your life purpose do have the power to make you happy.

- **Timed:** Without setting deadlines for your goals, you have no real compelling reason or motivation to start working on them. By setting a deadline, your subconscious mind begins to work on that goal, night and day, to bring you closer to achievement.

Self-Evaluations

Self-evaluations are effective at the first three levels of evaluation, and can be effective at the fourth level depending on the topic. Common types of self-evaluations include:

- Pre-workshop and post-workshop tests to assess learning

- Reactionary questionnaires

- Personal assessment quizzes

- Self-reporting metric systems

When measuring reactionary feedback, open-ended questions such as, "How did you feel about the training?" are fine. However, you should also include scale-based questions so that you can evaluate the group as a whole and evaluate the individual on an objective basis. When measuring learning, behavior, and results, questions that are objective and closed or scale-based are necessary for accurate assessment.

Peer Evaluations

Peer reviews are an excellent tool for measuring behavioral changes. However, you must ensure that the assessment system is well designed to prevent bias.

One excellent tool is 360 degree feedback. This system is designed to gather feedback from all of the people around an employee – their co-workers, subordinates, superiors, clients, etc. There are many resources available that can help you design a good 360 degree feedback system. If the topic that you are training on has high value, it can be worthwhile to take the time to develop a peer review system to accurately measure behavioral changes.

Supervisor Evaluations

Supervisor evaluations are an important part of evaluating behavior changes and assessing results. Like peer reviews, a behavioral evaluation system should be set up before the training. It should be ratings-based and include closed questions to help the supervisor stay objective. When asking supervisors to measure results, those results should tie in with the employee's regular metrics whenever possible. This achieves two things: it ensures that the measurements are relevant to the employee's day-to-day duties, and it minimizes the amount of extra work that the supervisor has to do. (Often, if measuring training causes more work for supervisors, they will often avoid completing the evaluation, or spend minimal time doing so.)

Two notes of caution about supervisor evaluations:

- The employee must know which metrics will be evaluated after the training.

- Like peer evaluation, supervisor evaluation can be biased. Develop your metrics accordingly.

High-Level Evaluations

Depending on the scenario, you may want to ask high-level executives in the organization to complete an evaluation. This will typically reflect behavioral changes and or measurable results. They will be particularly effective at helping you determine if your training was effective for the entire group. Make sure that these types of evaluations are necessary, focused, and short.

As well, although company executives are typically not involved in the nuts and bolts of training, they may want to see a high level evaluation report, particularly if the training was expensive, required by law, or was expected to have a high impact.

When you are planning the training, make sure to gather expectations from these key stakeholders, including timelines for results and the level of detail desired. Then, use this framework to build a results report tailored to their needs. The report will typically reflect behavioral changes and or measurable results.

Practical Illustration

Molly wore a long, sad face. She had been down in the dumps. Chris tried to cheer her up, but nothing seemed to work. Chris sang tunes. Chris did a cheer. Molly's grimace didn't disappear. Finally, Chris plopped herself down next to Molly and asked what she could do to get her out of this funk. Molly explained that she didn't feel like celebrating. Chris scratched her head. Chris knew that Molly and her team were champion sellers. Molly didn't see the success. Chris knew what to do. Chris gathered her tools and went right to work, showing Molly how to measure all her team's success. One by one, they studied the levels and measured the facts. Her team had been the reigning champions and that hadn't changed. Molly stood taller, happy that she now had the tools in her hand to measure every bit of success inch-by-inch.

I cannot teach anybody anything: I can only make them think.
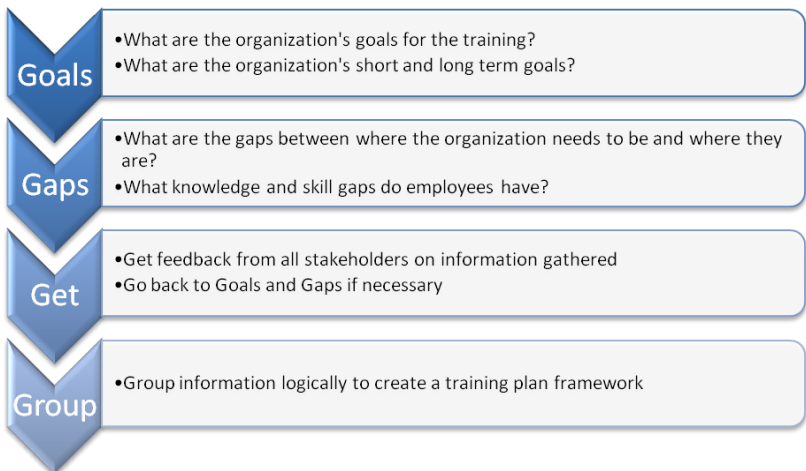
Socrates

Chapter Four: Focusing the Training

In order to prove results from training, your training plan must include clear learning objectives and a clear focus. This will enable you to build a solid evaluation plan. The first step in this process is to determine your training needs.

Performing a Needs Assessment

You should always perform a needs assessment before building your training plan. Even if your organization has handed you a complete training plan, it's always a good idea to evaluate the needs of your trainees so that you can deliver the most effective training possible.

The needs assessment process has four phases:

Goals
- What are the organization's goals for the training?
- What are the organization's short and long term goals?

Gaps
- What are the gaps between where the organization needs to be and where they are?
- What knowledge and skill gaps do employees have?

Get
- Get feedback from all stakeholders on information gathered
- Go back to Goals and Gaps if necessary

Group
- Group information logically to create a training plan framework

Creating Learning Objectives

Once you know what participants need from the training, you can write specific objectives that you want them to meet. You should begin by writing high-level objectives. For example, a high-level objective for a word processing class might be, "Understand how to format pages." A more detailed objective might be, "Understand how to change margins, add page numbers, and add borders for individual pages."

Objectives typically fall into one of three categories:

- Knowledge: Facts that a trainee should learn and be able to recall.

- Skills: A task that a trainee should be able to perform.

- Abilities: A combination of knowledge and skills that results in a desired behavior.

Here is an example of each type from our word processing course:

- Knowledge: What page formatting commands are available?

- Skills: Know how to perform various page formatting commands.

- Abilities: Format a page to various specifications.

Knowledge objectives are typically written as a question or in category form. Skill and ability objectives are typically written with a verb at the beginning. Objectives should also include a

measurement standard where appropriate, such as a dollar amount, percentage, or success rate.

Drilling Down Into Content

Once you have high-level objectives written, you can write more specific objectives based on your trainees' needs. You will probably not want to write a detailed objective for every topic in your course, but rather create several detailed objectives about the most important evaluation items.

For example, in a word processing course, you might cover several different aspects of page formatting. The detailed objective might be, "Understand how to properly format a page in landscape orientation according to the Smith Computers style guide."

Practical Illustration

Tammy looked like a deer in headlights. She'd lost her focus. The meeting made no sense to her. Trish noticed her eyes gloss over and offered to help. Tammy felt like her brain had shut off. She had no idea what the manager said. Trish stifled a snicker and drew out detailed plans to explain the training. She showed Tammy that she had all the tools she needed right at her fingertips. Tammy still couldn't wrap her mind around the training. Trish tried another option. Pulling a laser pen out of her bag, she told Trish to focus on it. Focusing on something made the job easier, she promised. Tammy liked the idea and gave Trish the thumps up. She tried to focus on one task at a time and soon she found that the job didn't seem so difficult anymore.

Only knowledge that is used sticks in your mind.

Dale Carnegie

Chapter Five: Creating an Evaluation Plan

An evaluation plan should be part of any training plan. It should be created at the same time – after the needs analysis and objectives are outlined. In this module, we'll look at the four key components of an evaluation plan.

What Will We Evaluate?

First, identify what you are going to evaluate. This should be based on the learning objectives you have identified.

Here are some tips for writing evaluation points:

- Each point should begin with a verb

- Points should be objective and measurable

- You should have approximately four points per eight hours of training (depending on how specific the points are)

- Points should be approved by stakeholders and reviewed with trainees

When Will the Evaluation be Completed?

Next you should determine which level the evaluation will assess. This will help you determine a time frame for each evaluation point.

- Before the training

- During the training

- After the training

Remember, some points may be evaluated at several levels and or time frames.

How Will We Evaluate It?

Our third step is to determine what evaluation tool you will use to perform the evaluation at each time point identified. Over the next few modules, we will look more closely at tools that are appropriate for the various time frames, but here is a quick overview of some tools to consider.

- Goal setting

- Verbal feedback

- Group quizzes

- Quiz games

- Formal tests and exams

- 360 degree feedback

- Metric gathering

- Skill assessments

- Role plays

- Questionnaires and inventories

- Pre-assignments and homework

Who Will Perform the Evaluation?

The last part of the evaluation plan is to decide who will assess each point. Your choices include:

- The trainee

- Their supervisor (direct or indirect)

- Their peers

- Their trainer

Remember, each point can have multiple assessors.

Practical Illustration

David packed his whole office into one small bag. Jim studied him as he trudged by, carrying the heavy load on his back. Jim questioned the bag. David slumped over, exhausted by the weight of it all and gave David his sad story. His evaluation loomed and he worried. No one told him what they'd evaluate. He panicked and grabbed everything he could to make sure he had enough to show his work ethic. Jim eye's burst out of his head. He couldn't believe his ears. "Nonsense." he said. "You don't have to carry a mountain of work with you. The company has specific criteria."

David had to steady himself before he fainted. No one had told him what he'd be evaluated on before. He panicked for nothing. David's shoulders slumped as he thought about the stress he'd put on himself. Jim smiled and offered him a hand.

I am always ready to learn although I do not always like to be taught.

Winston Churchill

Chapter Six: Assessing Learning before Training

So far, we have looked at some general tools for evaluation. In this module, we will focus on some tools that you can use to perform evaluations before training begins.

Workplace Observation

The first tool we are going to discuss is workplace observation, where current workplace behaviors are observed and reported on. It can be done by the trainee, their peers, their supervisor, or their clients.

It is important that observations be recorded and evaluated in an objective way. One good way to do this is to develop a rating system. Or, if you are gathering feedback from multiple sources, develop a 360 degree feedback rating to increase its accuracy.

Observation should be supplemented by other, more objective evaluation methods.

Objectives Assessment

Before the workshop, it can be a good idea to give participants the learning objectives and ask them how they would rate their level of knowledge with those objectives before the workshop. You can even ask participants to note where they would like to be in a week, a month, and a year. It is important that participants be given a rating scale so that results are measurable.

You can also turn this type of assessment into a 360 degree feedback tool by asking supervisors and peers to evaluate participants as well. It can be particularly valuable for supervisors to use this tool to start a discussion about what their expectations from the training are.

Pre-Assignments and Pre-Tests

Another useful tool is to design a pre-assignment or pre-test around the content of the course. Some ways to do this:

- Self-analysis or supervisor analysis as discussed previously

- Case study

- Reading assignment

- Learning wish list

- Test on prerequisite knowledge

- Goal setting

- Personal case study (for example, have participants come to the class with a problem or project)

When designed properly, these pre-workshop homework assignments can accomplish a few things:

- Get the participant in the right frame of mind for the workshop

- Provide participants with background knowledge

- Get participants thinking about what they want, making learning more relevant to them

- Help you assess participants' knowledge and needs, and target your course more accurately

- Help you assess participants' commitment to the course

Practical Illustration

Marcus sat with a scowl on his face. Training drained him. Marcus had two more days of training. He didn't think he could drag himself to it. The phone rang, causing him to jump out of his seat. His co-worker, Daniel, called to remind him about the training. Marcus refused to go. He put his foot down and said he'd call it quits if he had to go. Daniel shook his head, thinking his friend had gone mad. Marcus held his breath. Daniel had an idea. He knew how to convince his pal to go to the training. He rushed to Marcus' office and gave him an earful and told him to pull himself together. Marcus wanted to refuse, then, a light bulb went off in his head. He went to the training, but this time armed with questions that would help him understand better.

The mediocre teacher tells. The good teacher explains. The superior teacher demonstrates. The great teacher inspires.

William Arthur Ward

Chapter Seven: Assessing Learning during Training

Often, trainers may assess learning before and after training, but they may neglect to check in with trainees while they are learning. It's very important to include this in your training plan, particularly since most training programs start with foundation concepts and build towards advanced concepts. If your trainees get lost at the beginning, your entire program could be in jeopardy.

Reviewing Learning Objectives

At the beginning of the program, make sure you review the learning objectives of the course with participants. Give them the opportunity to give you feedback about the objectives:

- Are all the objectives clear?

- Is there anything that is missing?

- Do the objectives seem reasonable?

- Do participants understand how these learning points can translate back to the workplace?

During the program, check in with participants to make sure you're still on track with the learning objectives. When participants are asked to perform evaluations, point out the ties back to the learning objectives.

Performing Hip-Pocket Assessments

During the course, check in with participants and evaluate them on reactionary and learning levels. Questions that you will want to ask include:

- How do participants feel about the training?

- What has been the best thing about the training so far? The worst thing?

- What have participants learned?

- What would participants still like to learn?

You may also want to ask specific questions about key content points.

Quizzes and Tests

Quizzes and tests are a good way to measure how much participants are learning during the course. Mid-point tests are good in many situations, including:

- Workshops that have a lot of content

- Workshops with difficult content

- Long workshops

- Topics that depend on each other

Don't forget that a test doesn't have to mean an hour-long exam. Try some of these fun ideas instead:

- Divide participants into pairs or teams. Have them write quiz questions for each other. If the group is competitive, make it a tournament.

- Place sheets of flip chart on the walls with key topic words. Assign a group to each sheet and have them review that topic. Or, have participants walk around and jot their own notes on the sheet, and review as a group.

- Do you remember the picnic game from your childhood? Each person in the group would bring something to the picnic that started with a particular letter. The group would start with A and move through the alphabet. Play this game with your group, but choose a topic related to the workshop.

- Play a game show like Jeopardy or Wheel of Fortune, with topics tied to your content.

- Have participants sit in a circle. Toss a soft ball to a person and have them name one thing that they have learned so far. Have participants toss the ball around until everyone has spoken. Make sure to include yourself in the game!

Skill Assessments

Quizzes, questionnaires, and tests are great for evaluating many types of knowledge. However, you may need additional tools to evaluate changes in behavior, abilities, and attitude. Below is an introduction to some of the tools that can help you evaluate these types of learning.

Demonstrations: Demonstrations can be a very powerful teaching tool, particularly for complex tasks. One method is to demonstrate the desired task, and then have participants demonstrate it back to you. Or, place participants in groups or pairs and have them demonstrate the task to each other. Just monitor the activity to make sure that the information is correct.

Role Play: Role plays are often listed as participants' least favorite part of a workshop, but they are very helpful when learning new behaviors. Conflict resolution, mediation, negotiation, communication, and training are just a few of the topics where role plays can be helpful.

To make the most of role plays, try these tips:

- Give participants the option to take an active or inactive role.

- Have clear instructions and roles.

- Provide constructive feedback.

- Provide tip sheets on the behavior to be role played.

Games: Games can provide a fun yet educational learning experience for participants. Make sure to practice the game ahead of time and make sure that it truly helps participants practice the skill that they are learning. And don't forget – always have a backup plan.

Simulations: When they are well designed, simulations are excellent ways to assess how well a participant has learned a skill. They are particularly useful in situations where it is imperative that participants have excellent knowledge before going ahead with the real task, such as medical procedures or machine operation.

You can enhance the usefulness of these tools by adding a subjective rating system to them. For example, you could have a scorecard for demonstrations and role plays, or perhaps the simulator can provide a report on the user's success and failure rates.

Practical Illustration

Rose sank down in her seat. The trainer didn't make any sense to her. Rose got lost hours ago and had no hope of catching up. Julia watched her friend dissolve to practically nothing. Julia knew that Rose didn't understand. Julia grabbed a pen and started writing, setting her pen on fire. She had a fool-proof plan. Julia drew diagrams and crafted drafts. Rose felt like a fly on the wall, listening to a conversation in a foreign language. Julia slipped her notes to Rose. Rose's eyes grew wider than saucers as she read. Julia watched as Rose's face transformed. Rose went from utter confusion to a walking book of knowledge. Rose couldn't believe how the information finally fell into her lap. She understood it. Rose sat up in her chair, no longer confused.

Life is a succession of lessons which must be lived to be understood.

Ralph Waldo Emerson

Chapter Eight: Assessing Learning after Training

Your evaluation plan should include evaluations after the training is finished. There are two reasons for this. One is that some skills take months or even years to develop. Another is that you want to make sure that the trainee continues to apply their knowledge after the training is completed.

Evaluation Timelines

Use this matrix to determine what type of evaluation you should be performing at each time gate.

	Reactions	Learning	Behavior	Results
Immediately after training	X	X		
A week after training		X	X	
A month after training			X	
Six months after training			X	X
Beyond six months			*	*

We have placed an asterisk for the timeframe of beyond six months because this time gate is optional. Usually, if trainees are displaying the required behavior at the six month mark and results are visible, then your evaluation can be complete. In some cases, however, you may need to track behaviors and results for a longer period of time.

Learning Journal

A learning journal is an excellent tool to help participants track their progress after training. It can be as simple as a notebook or word processing file. Participants should make a daily or weekly entry summarizing what skills in training they used, what challenges they encountered, how they handled those challenges, and any relevant information they learned.

For maximum effectiveness, try these tips:

- Provide trainees with a template to use.

- Ask trainees to fill out the journal at a particular time (i.e. daily, weekly, bi-weekly, etc.).

- Set up check-in points with you, a buddy, or their supervisor.

- Encourage trainees to use the journal to identify points for further learning.

Additional Methods of Evaluation

Many of the other methods of evaluation that we have already discussed can be used to assess learning , including:

- Quizzes and tests

- 360 degree feedback

- Self-analysis or supervisor analysis

- Metrics tracking

- Workplace observation

- Follow-up meetings

Remember, evaluations should be:

- Easy to complete

- Effective

- Not time consuming

- Measurable

- Consistent

- As objective as possible

Practical Illustration

Roland's eyes were spinning. His brain felt overloaded. Roland spent what felt like years in training and his head wanted to explode. Roland captured the attention of this coworker Michael. Michael shook his head. He couldn't believe his eyes. Roland struggled to balance the old information with the new information. Michael raced to his rescue, offering a hand. Michael helped Roland to juggle all of the information and put it in some logical order. Roland nearly toppled over as Michael removed each layer of information and tucked it into it's rightful place. Roland felt the pressure lift right off his back as Michael continue removing one layer after another. Roland could see the bigger picture now and knew just what to do.

Live as if you were to die tomorrow. Learn as if you were to live forever.

Mohatma Gandhi

Chapter Nine: The Long Term View

In rare cases, you may need to evaluate participant progress beyond six months post-training. This module will give you some guidelines for those situations. Patience and an understanding of how long some changes take will provide an excellent base is long term evaluations are required.

Creating a Long Term Evaluation Plan

When creating a long term evaluation plan, make sure the following points are covered:

- Delegate long-term evaluation to the appropriate supervisors.

- Build a system where supervisors are accountable for evaluations.

- Have an organizational champion to follow up and make sure evaluations are done on time.

- Check in with the organization to make sure the evaluation strategy is working. If it's not working, change it!

- Get executive support for your plan.

Remember, evaluation does cost time and money, so evaluations past the six month mark should only be part of the evaluation plan when absolutely necessary.

Methods of Evaluation

The following tools are most effective for long-term evaluations:

- Repeated assessments

- 360 degree feedback

- Knowledge re-testing

- Metric tracking

- Structured observation and interviewing

Long-term evaluations must be built carefully, with a focus on measurability, sustainability, and consistency.

Documenting Lessons Learned

At the end of your evaluation period, you should take time to document what went well with your evaluation plan and what you would do differently next time. Then, when building your next evaluation plan, keep this feedback in mind.

Questions you ask yourself include:

- What went well?

- What could have gone better?

- What did I learn?

- What is one thing that I will definitely do again?

- What is one thing that I will definitely not do again?

- What changes did I have to make to my plan during its execution? Why were these changes necessary?

Practical Illustration

Otto felt his head spinning. Time moved too slowly. He could himself growing older as the clock ticked in his head like the sound of a beating drum. Otto counted the seconds until he could measure the results of his work. Tom tried to distract Otto. Tom spoke a mile a minute, trying to fill the empty spaces with his words. Otto had already pulled his hair out and would soon hit a brick wall if time didn't fly quickly. Otto paced and stopped, then, paced and stopped. Time wouldn't budge. Tom pulled every trick out of his hat and couldn't keep Otto interested. Tom started pacing too. After they nearly burned a hole in the carpet, Otto had an idea. He ran around frantically and made notes on his hand. He needed a time line to guide him through the process. In less than ten minutes, he had one.

An organization's ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage.

Jack Welch

Chapter Ten: Calculating the Return on Investment (ROI)

Companies often spend a lot of money on training, so it only makes sense that they will want to see what they got back from the training. In some cases, this may be easy – you may be able to see a drop in hard numbers (like product defects, customer complaints, or days absent) as a result of your training. In other cases, the benefit might involve something much harder to calculate, like reduced stress, improved teamwork, or better communication. This module will show you how to calculate the return on investment (ROI) for any training program.

A Basic ROI Formula

The basic ROI formula looks like this:

$$ROI = \frac{\text{Program Benefits}}{\text{Program Costs}} \times 100$$

The result will give you a percentage.

Identifying and Measuring Tangible Benefits

Tangible benefits are those with a number attached to them. Some examples include:

- Rate of absenteeism or turnover

- Sales

- Profits

- Number or dollar value of returns

- Number or percentage of customer complaints

- Length of downtime (due to accidents, machine failure, etc.)

- Production volume

- Error or defect rate

- Customer and/or employee satisfaction

- Response time

When gathering these metrics, make sure to gather information for a few months before and a few months after the time period that you are measuring, as well as data for the same time period in years previous. You will also want to be aware of external factors that could affect your data, such as weather, economic conditions, and changes in the company.

Identifying and Measuring Intangible Benefits

Training often provides more intangible benefits, such as better communication, improved anger and stress management, clearer writing skills, or more effective time management. It can be hard to put dollars and cents value on these skills; however, we are often asked to do so to prove that the training has been worthwhile.

Here are some ways to convert intangible benefits to hard numbers:

- Calculate the time saved in hours and multiply by the person's hourly wage

- Tie the intangible benefit to a tangible benefit

Calculating Total Costs

Our next step is identifying the cost of the program. This should include:

- Employee salaries paid while they were attending the program

- Trainee expenses such as food, hotel, and transportation

- Cost of materials and facility for the program

- Facilitator cost before, during, and after the program

- Development and licensing costs

- Administrative costs

Making a Business Case

All of the evaluations and measurements that you perform before, during, and after a training session should give you quantifiable, consistent information about the training that you performed. This information will help you:

- Improve your training programs

- Have confidence in yourself as a trainer

- Gain support for your programs

You can also use this information when building a business case or proposal for your next training program. A business case usually has the following items:

- Executive Summary

- Background Information (to provide context)

- Needs Analysis

- Recommendations

- Anticipated Benefits

- Estimated Cost

- Next Steps

- References and Supporting Materials

Practical Illustration

Jennifer watched her hard-earned money go down the drain. Jennifer's wallet had grown thin. It felt like her money just flew out of her hands and out the window. Jennifer couldn't wait to see the return on her very lofty investment. Jennifer usually kept a close eye on all of her finances. When she put everything including the kitchen sink into her company's training program, she had no idea what a tight squeeze it would put on her bottom line. Jennifer chomped at the bit, waiting to see positive results. Finally, a little bird from the office arrived with good news. Profits were on an upswing and production had doubled. Jennifer jumped for joy at the sound of that. Her investment had paid off.

Experience is the name everyone gives to their mistakes.

Oscar Wilde

Closing Thoughts

- **Charlie Munger**: Forgetting your mistakes is a terrible error if you are trying to improve your cognition.

- **Og Mandino:** Take the attitude of a student, never be too big to ask questions, never know too much to learn something new.

- **Aldous Huxley**: Experience is not what happens to a man; it is what a man does with what happens to him.