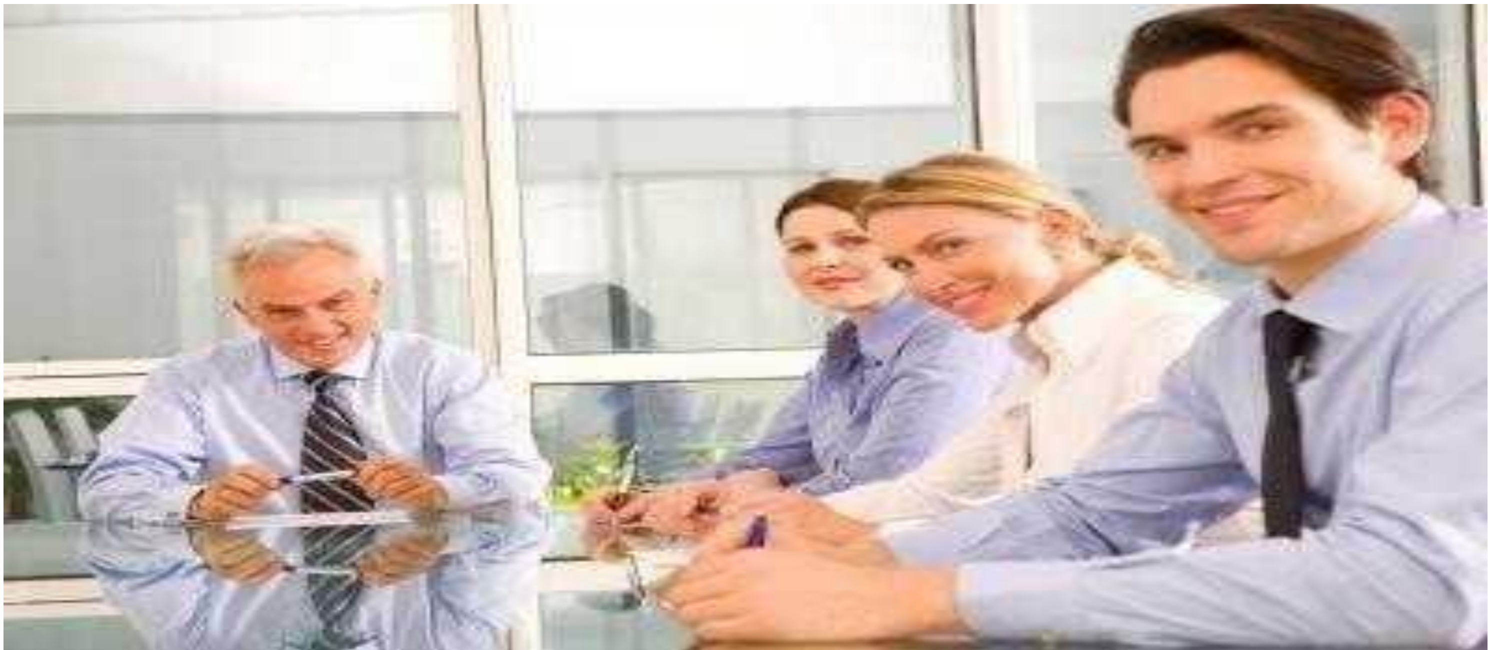


UNIT 15 Measuring Training Results

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Identify the most effective methods of training evaluation
- ✓ Describe the steps required in the essential elements of measuring training results
- ✓ Tie training measurements back to the original training objectives
- ✓ Explore the most effective methods to report training results, including a return on investment

Unit 15

Setting the Framework

Identifying What You Will Measure

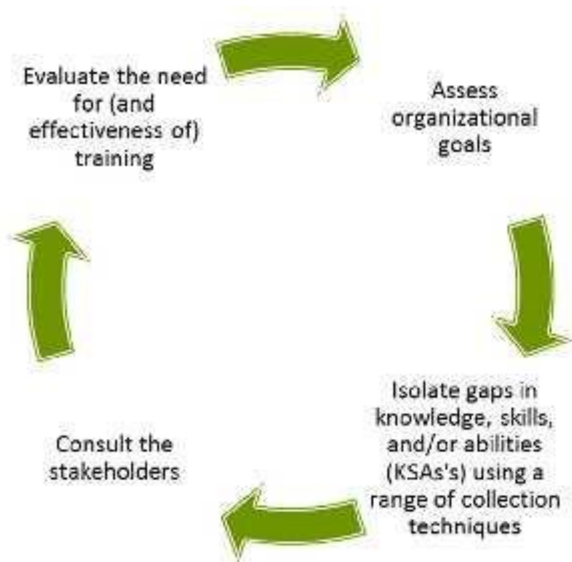
Process Overview

The time to plan how and what you will evaluate is during the course design process. Knowing what you need (and want) to evaluate ensures that you develop the right curriculum and that you are clearly stating the learning objectives.

The best place to start with this stage is to look at your training needs analysis. During that analysis, we recommend that you use the term ICE to ensure you include all the necessary steps.

First, isolate the problem by identifying gaps in knowledge, skills, or abilities. Then, consult with the stakeholders to determine the impacts of the gaps are. Finally, you can evaluate your options and set up an action plan.

The following figure may be a familiar one to you if you have completed the course "Developing a Training Needs Analysis," and nicely outlines the steps to follow.



Isolating

Isolating the problem effectively will help you to determine whether there is one main issue, or whether several smaller issues are having a significant impact. Several techniques are available in this process, and each has its own benefits and shortcomings. Sometimes a mixed approach is best (if time and resources are available) in order for you to get the most comprehensive answer.

Techniques may include observation of people as they work; questionnaires; consultation and interviews; testing; reviewing work samples; and researching documentation included in employee evaluations, policy manuals, audits, program reports, and so on.

You are looking for **surface problems**, such as an obvious need for skill development, where employees need to learn new skills in order to perform their tasks effectively. You also have to be able to identify **underlying problems**. These underlying issues can be more difficult to define, but they are an important part of a thorough analysis.

An additional benefit of isolating the problem is that it can help you to obtain **background material** that you can draw on for training. Using real, concrete examples in your case studies and training examples makes the training much more meaningful for participants. In addition, trainees who do not enjoy training, or find it difficult to learn from artificial scenarios, are more successfully engaged in training that uses real examples.

Consulting

Sometimes employees would like training, but that training does not support the needs of the organization. You will find it very difficult to gain approval and resources for training that does not fulfill the strategic plans of the organization.

At the same time, if the company is not aware of gaps in an employee's knowledge, then part of your role can include reporting where the problems are and resolving them by designing an appropriate training plan. If you can identify the problem areas, relate them to the organizational strategic plan, and demonstrate the value of training to the organization (including their return on investment, or ROI), then you are much more likely to receive support for the training initiative.

For example, an employee with excellent technical skills who gets promoted to a supervisory role needs to understand the dynamics of leadership, motivation, and performance management. Training can help solidly establish the person in their new role, which can often be challenging when a team is making a transition from having a co-worker become their new boss. Training will also help the new supervisor gain confidence and understanding of their leadership role. These key skills will help the new manager work more effectively, meaning the company gets more for their money.

Evaluating

Next, you will thoroughly examine the results of your interviews and investigation to **determine what training is required**. At this stage, you may discover that training is not the best option for some issues. This can be the case where, for example, staff are not meeting their goals because of performance issues, unclear expectations about their roles and priorities, or interference caused by medical issues.

Depending on the needs identified, you will also determine the best **methods of training** to use and include that in your training needs analysis. Adults learn in different ways, so using a variety of training methods keeps learners engaged and interested, while also achieving the intended results.

On-the-job training, mentoring, workshops, seminars, conferences, peer training groups, cross-functional experiences, teleconferencing, and webinars are just some of the ways to enhance traditional classroom experiences. In addition, varying the time allocated or location can also enhance training.

Take Note

As you undertake the training needs analysis, it's entirely possible that you will find some complex issues. One of your goals with course design is to identify which issues training can resolve, and which issues need to be dealt with from a human resources context.

Be sure to include members of your human resources and management teams as you move ahead. This will help you to feel out the amount of support they are willing or able to provide for training initiatives. It also helps lessen any surprises for them if your results are a bit hard for them to accept. This might occur, for example, when training is not identified as the necessary remedy, but giving employees clear expectations about their job role is.

Determining How You Are Going to Measure It

If one of the goals in training is to achieve some kind of behavior or attitude change, then part of our job is to measure what change took place. In addition to that, at some point following the training (14 or 30 days onward, for example), it's also a reasonable idea to determine if the changes "stuck" and your employees continued with the newly learned behavior, or reverted to old skills or attitudes.

Brainstorm all the methods of evaluation that you can think of.

Designing an Evaluation Strategy to Fit Your Training Needs

Of course, there is more than just coming up with a novel approach to evaluation to conducting an effective analysis of how the training went. Your evaluation strategy must be selected before the training is designed (so that you know and can plan for what's being measured), and must also reflect your training needs (which are identified in your training needs analysis).

To begin, consider what the objectives of your course are and what the most efficient and effective way would be to evaluate those objectives. Here are a few examples to think about:

- If you are offering training in changing oil in a car, a video demonstration makes sense.
- In offering training in a complex set of steps to figure out a math equation, a video demonstration of the concepts might be ideal. If video is not available, a paper and pencil test might have to do.
- If you provide space training in how to launch a satellite, a simulation might be the most practical method.
- A driving test typically needs to be taken in a car, with the student driving while the instructor sits in the passenger seat.
- If you are training young cooks, a practical demonstration with the instructor tasting the prepared food might be the best method.

Think of the next course you are offering. Is it:

- In a classroom
- Over tele-conference or live video (like Google Hangouts or Skype)
- Online learning without an instructor present
- Online learning with access to an instructor via live chat

Part of choosing the right approach is considering your students' comfort level with technology. As well, think of their **physical location** versus yours. One of the great advantages of online learning is that it saves us a lot of time in travel, hotels, and missed flights. However, your participants may or may not learn best in an online format. You can't force people to like online learning (especially when they are very social individuals who love group learning), but you can help most of them embrace online learning when it makes the most sense.

Making Connections

Take a minute to write a few notes about the ideal arrangements for your next workshop or training session. If you don't have one set up yet, use this course to help you get familiar with this process.

What are the learning objectives?

____

____

____

____

What are the objectives of the organization that is sponsoring the training?

What do you know about the participants? Consider their experience levels, location, and areas of interest.

What would you choose as a delivery method and location?

Do you need additional research in order to answer these questions?

What type of data do you need: hard data and numbers, or soft data gathered from interviews or surveys?

How will you gather this data and when?

Given what you have now decided about delivery methods and location, what would be the best approach to evaluate that particular workshop, and why?

Kirkpatrick's Evaluation Model

Methods of Evaluation

In the 1950's, Donald Kirkpatrick launched a four-stage evaluation model that has stood the test of time for its ease of use and its applicability to all types of training. However, the model elements have been updated to reflect how training has changed since that time, so we will include the enhancements in this session, along with the basics.

The Four Levels

Level 1: Reaction

The first level of evaluation considers the way trainees react to training, including the degree to which they actively participate in learning and contribute to the learning experience. This also includes consideration of relevance, meaning how they will be able to apply what they have learned to their job.

Level 2: Learning

This level considers the knowledge, skills, and attitudes (KSA's) that trainees gain from the training, in addition to the confidence that they can do it and the commitment to actually see it through on the job.

Level 3: Behavior

This level evaluates the degree to which the new KSA's are applied on the job, including processes and systems in place that can reinforce, encourage, and reward critical behaviors.

Level 4: Results

The final level considers the impact that the change in KSA's have on the organization, including observation and measurements that demonstrate the application of critical behaviors being on track and leading to the desired results. Some of this can be measured through calculation of a return on investment.

Exploring the Levels

A very thorough evaluation of the training offered will include all four levels, measuring reaction, learning, behavior, and results. The fastest and most common evaluations focus on level one (**reactions**).

You may be familiar with these in terms of filling out a student satisfaction survey or evaluation form at the end of training. To really get an idea of the value of training to lead to change in the organization, however, all four levels can be wholly appropriate, although levels three and four can add significant cost to the undertaking.

Change at the **results** level can often be very difficult to measure. Training that is directed toward shifts in attitude and motivation, for example, must be measured with a multi-faceted approach. For example, a sales company that provides team building training for its entire staff may choose to measure changes like number of closed sales and customer complaints as a demonstration of improved teamwork. However, it can take months or years to recognize that the changes were the result of training, and the shift also requires input, support, and influence from supervisors, sales staff, leaders, and administration.

Using Rubrics to Evaluate Results

When tests are used as part of an evaluation, grading is more difficult for short answer questions than multiple choice, fill in the blank, or true/false questions. The trainer must pre-determine the expectation that will be met in an answer. A common method to measure short answers is to use a **rubric**, a structure used to compare answers with a benchmark. The rubric must include rules for scoring, and usually allows for partial marks to be granted for incomplete responses.

A sample rubric for a question about this workshop might look like this.

Question: Describe six essential elements of a training program.

Unacceptable (1)	One or two elements are described, with no supporting information.
Needs Improvement (2)	Fewer than six elements are described. Training needs analysis is not among the answers.
Good (3)	Six elements are described. Each element meets the standards covered in training, including training needs analysis.
Excellent (4)	Six or more elements are described and all are technically correct. Answers include reflecting individual needs of the trainees.

Other Methods of Evaluation

Essay Questions

Essays are seldom used in organizational training and are more common in educational settings (such as school, college, or university). These questions must be very carefully developed in order for the learner to be able to craft an answer that reflects their mastery of the learning objectives. Essays take considerably longer to write and grade than other evaluation techniques.

Behavioral Evaluation

A written exam, like those described above, may demonstrate that a trainee understands the steps to completing a task and has acquired new knowledge. However, a behavioral evaluation requires the trainee to actually perform the skill and demonstrate that they can apply the knowledge they have gained.

These evaluations will require a detailed list of conditions under which the trainee will be measured and the acceptable standards. The evaluation might take place right at the end of training in the classroom, or may be required on the job at a later time in order to demonstrate the ability to perform in a real situation. Behavioral examinations may be arranged in a simulation if the testing would present a safety hazard.

Let's use a restaurant cook as an example. If the organization has developed a new dish and wants all their cooks to prepare it for a new menu, it would be reasonable to have the cook prepare several samples and have the final results evaluated by someone who actually gets to taste it (sounds like a great job!). On the other hand, if the trainee has learned how to do something that can only be demonstrated in a very dangerous situation (sweeping a minefield, for example), then a simulation is reasonable.

Points to Remember

In this course, we are looking closely at the evaluation that measures the results of the training itself, but in order to do this thoroughly, we need to look at how participants in those programs are evaluated as well.

Scoring paper and pencil exams can be challenging at the best of times. However, when your trainees present with learning disabilities, vision or hearing impairments, attention deficit, or are in the midst of learning a new language, you need to get more creative to meet the needs of your trainees. Offering alternatives for assessment is important. Using point form in short answers, not expecting perfect spelling or grammar (unless it is a language course), and being open to suggestions from the trainees are all helpful strategies.

Most trainers offer an evaluation that measures the process surrounding the training (did the trainer do their job and meet the objectives). When you actually want to test for knowledge, then a test must be developed. Whether you develop a test that is administered at the end of training, or after the individual returns to work and tries the new skills for a short period of time, developing knowledge tests is a specialty. If you are responsible for developing knowledge testing, you will also be responsible for applying pedagogical principles of testing, which requires specific learning for the trainer.

Creative Evaluation Strategies

Many trainers are so focused on the content they have to include that the evaluation is left until the last 15 minutes of the entire workshop. They ask if there are any questions and have a form completed as people leave the room. After an interactive and compelling workshop, that evaluation method can seem impersonal and not at all educational to your trainees. However, if you leave yourself more time in the evaluation phase, you can facilitate the transfer of learning from the workshop to the workplace while reinforcing the concepts that were covered.

The simple act of distributing the evaluation form early in the day allows trainees to formulate answers and comments throughout the day, rather than trying to recall information at the end of the day when they may be tired or simply keen to get out of the door quickly.

Here are some other suggestions for wrapping up and evaluating training that are fun for your trainees, engaging for the trainer, and a little different than more standard methods.

Recommendations

A helpful way to measure trainee's reactions to the program, instead of asking, "Would you recommend this program to your coworkers?" might be to lead them in to a more thorough examination of their experiences. A sheet of paper with this question on the top can lead to answers that are difficult to summarize, and yet far more meaningful in content: "Imagine that a colleague (or your best friend) was thinking about attending this program the next time it is offered. 'What were the top five benefits of the program?' you are asked. How will you respond? Please take the next ten minutes to write your response below."

Mail outs

Who doesn't want to get something in the mail, even if they wrote it themselves! One technique that has been very successful is to have trainees complete a postcard before they leave for the day. On the back of the postcard, the trainee writes two or three goal statements that will draw on what they have learned during the training. For example, they may write: "In the next thirty days, I will: genuinely compliment at least one of my co-workers every day, invite at least five people that I do not normally eat with to have lunch with me, and answer all questions from new staff cheerfully and professionally."

The participants address the postcard to themselves and return them to the trainer. About thirty days later, the trainer mails the postcards to the participants. Then they have an opportunity to review the goals that they set and see how well they achieved them.

Depending on how this activity is structured, trainees could also write the goals on a sheet of paper and slip it into an envelope. This will allow for the trainer to enclose a tip sheet on a topic related to the workshop, or an encouraging word or two about keeping on track with their goals.

Feedback Forms

A formal evaluation form will allow you to quickly tabulate your results and to effectively assess the value of the training.

Evaluation Tips

Make it Anonymous.

You will get honest feedback if trainees are not easily identified by the form. Forms that capture names or departments, or that have some kind of number identification, will discourage trainees from providing you with useful feedback. You may have an optional section where trainees can be contacted for more information, if they wish.

Simple is Best.

Extensive forms that get completed at the end of a program are often not completed fully. At the end of training, everyone is thinking about what they have to do next, and a long form or survey will not get their full attention. Keep your evaluation short, to the point, and only request information that you need answers to. If you format your questions to reflect the objectives that were identified at the beginning of training, then you will have information that you can easily use.

Keep it Positive.

It is not necessary to include questions about things that you could improve in training. Generally, if people are unhappy about something, they will let you know either in person or in a comments section.

Encourage Additional Comments.

If you prefer to add one or two open-ended questions to your form, you should do so at the end of the evaluation. These answers are more difficult to analyze statistically, but will give you more extensive feedback about any positive or negative aspects to the training.

Evaluating the Evaluation

Making Connections

Look at the sample feedback form shown on the following pages.

What do you like about this form?

What would you change about this form?

Sample Feedback Form

Please rate your answers on a scale of 1 to 5, where 1 means that you strongly disagree with the statement, and 5 means that you enthusiastically agree with the statement.

1	2	3	4	5
Strongly disagree	**Somewhat disagree**	**Agree**	**Somewhat agree**	**Enthusiastically agree**

1. As a result of this seminar, I feel reasonably comfortable explaining the essential elements of a training program.

1	2	3	4	5

2. As a result of this seminar, I feel reasonably comfortable explaining the different approaches to training that are available.

1	2	3	4	5

3. As a result of this seminar, I understand the importance in preparing, researching, and delivering strong content.

1	2	3	4	5

4. As a result of this seminar, I have an understanding of how to design feedback and evaluation

strategies for a program.

1	2	3	4	5

5. As a result of this seminar, I have a reasonable comfort level in creating a training proposal.

1	2	3	4	5

6. Would you recommend this course to a co-worker or colleague? Why or why not?

7. What did you think of the facility (cleanliness, temperature, chairs, and refreshments)?

8. Please make any additional comments or include additional feedback here.

If you would like us to follow up with you about the nature of your feedback, please provide your name and telephone number here.

Name Phone

Getting Results by Testing the Program

When you are responsible for program development, another important factor that is seldom available (yet really valuable) is to test the entire program.

A program can be more easily promoted when there are results available to the curious or wary. A tested program is one that meets the stated objectives, proving that the instructional design is appropriate, that the stated objectives are achievable, and that the organization is backing the program.

Making Connections

Select two evaluation strategies or techniques that would help a trainer to confirm what you have learned and to report back to the organization whether or not the training met the objectives, just as if this workshop was a test program. Be sure to outline the reasons why each would be a suitable choice.

Evaluation Strategy One

Evaluation Strategy Two

The Return on Investment

Clarifying Expectations

When an employer or contractor arranges for training, they are typically very interested in seeing some kind of a measured result. The days of training for fun or as an incentive to staff are long gone. Sometimes trainers are so focused on delivering the program, however, that they do not work in an adequate amount of time for evaluation, and this creates challenges too. This kind of challenge is one of the reasons we recommend inviting participants to complete the evaluation throughout the day instead of rushing to do it at the end.

When you undertake a commitment to training, it's very important to define the stakeholders' expectations. For example, it's not unusual for a training manager to be told that there is a gap in performance somewhere and training is needed. The training manager returns to their department, and develops training to resolve the gap. However, you may have noted that the training manager didn't take any additional steps between being told to provide training, and then going into the instructional design phase. This is a classic example of the training manager not knowing what kind of result the stakeholders are looking for, and leads to training that technically closes the gap and yet leaves the stakeholders disappointed. This can be especially true in cases of soft-skills training, the results of which can be hard to measure.

In a typical example of a call center, let's say the stakeholders identify that customer service complaints have increased by 20 percent in the last six months, so they feel that some degree of customer service training is needed. As requested, the trainers dutifully provide training in areas like communication skills and dealing with difficult people. However, the main source of complaints is that the customer service team isn't always given the authority to actually solve a client's problem by sending out a service technician or accepting a return on merchandise. In cases where the customer service representative can only offer a soothing conversation, but no real help to the customer, then complaints won't decrease no matter how much training is completed.

Instead, prior to designing training, the training manager must complete a thorough training needs analysis, including obtaining the stakeholders' expectations of training, determining why the gaps exist, and getting the stakeholders' input for the ideal future state (how things will be after the training is complete). Then the customer service representatives need to be empowered to make actual efforts to resolve problems and complaints. In an ideal application of level three in Kirkpatrick's model, the evaluation has to include recording live phone calls between the customer service representatives and customers, observing them using the techniques and solutions they learned in training, and offering coaching as needed to lead to better call outcomes. Counting the number of complaints doesn't provide enough information on its own.

Kirkpatrick's levels of evaluation (reaction, learning, behavior, results) have the potential to provide comprehensive information, especially when they are thoroughly implemented. There are expert trainers who have added additional steps, but we have included these in the updated model. (For example, Jack Phillips and Ron Stone use a fifth key indicator: calculating the return on investment in training. However, this can be included in level four of Kirkpatrick's model.) The outcomes for you as a trainer are the same from either model.

The ultimate indicator of value, according to the Kirkpatrick model, is the Return on Expectations (ROE). The learning professional is responsible for clarifying what expectations stakeholders have and building this into Level Four (Results). This often takes some negotiating on the part of the training professional, as you weigh what the stakeholders expect with the resources (i.e. time and money) that are available.

What Training Does

In training research, it's been validated that a training event only brings about 15 percent of on-the-job application (and as such, results). Despite knowing how low that percentage is, most trainers spend most of their time on level one and two activities (the design and delivery of the training) despite often knowing how little impact the training itself will have. Proving some kind of return on investment, then, will push trainers to do more and implement an execution plan (level three) that is effective and much stronger than delivering training alone. This also supports the critical nature of collaboration in training development, so that expectations, results, and training objectives are clearly understood by everyone involved.

Following the training, it's inherent that workplace supervisors and managers (and leaders higher up, depending on the level at which training is directed) prepare students for training ahead of time, and then reinforce new concepts afterward. Reinforcement can take place in many ways, including coaching and performance management, but it must be offered in order to achieve and demonstrate the required outcomes.

Getting the Evaluation Right

Most workplace trainers consistently use a level one evaluation method at the time of training. This might be conducted through a quick multiple choice quiz with paper and pencil, or by using a simple (and free) electronic survey tool like Survey Monkey. While some learners might expect this kind of review, a lot of trainers get frustrated by them for a few reasons:

- They don't accurately measure what's learned, only what's recalled for the test.
- They don't demonstrate a transfer of learning back to the workplace.

Since we've already determined that the best (and perhaps only) way to assess whether the learning sticks is to evaluate trainees later on, let's look at a couple of helpful ways to do that.

- Survey the learners and see what they have applied to work
- Survey supervisors/managers and determine whether the training lead to the desired state in the workplace

These surveys don't have to be extensive or costly. However, one downside to a survey after training is that the participation rate can be quite low. As a training professional you will have to emphasize the importance of completing the survey and request lots of participation.

Making Connections

Use the space below to design your follow-up survey.

Target Group: Trainees Supervisors/Manage

Question One

____

____

____

Question Two

Question Three

Question Four

Question Five

Cost-Benefit Analysis

Choosing the Right Approach

Doing a cost-benefit analysis (CBA) can be a challenge in the training arena because we frequently work with intangible concepts and people have different ideas about what can be measured. That being said, a cost-benefit analysis is something you need to be prepared for, and you need to know exactly what your stakeholders want measured.

We recommend a cost-benefit analysis that reflects a project management approach, since each individual training session can be considered an independent project quite easily.

When you start out on your cost-benefit analysis, you need to clarify which of these approaches you are taking:

- Are you assessing the cost of training and development in relation to the individuals who take the training? This is often an assessment that skims the surface of cost, but might be as much as the stakeholders want because your training department costs are captured elsewhere in the budget.
- Or, are you assessing the cost of training and development in relation to the costs required for establishing the program (or purchasing it), plus the trainer's time to learn the program they will teach, plus their trainer's salary and benefit and overhead costs?

The second option is much more comprehensive, will take you additional time, and will make the costs look much higher than in the first option. Whether you select option one or two will depend on what your stakeholders expect.

In conducting your CBA you'll also have to be prepared to estimate the follow-up costs which, as we have seen through implementing level four of Kirkpatrick's model, are essential in determining the effectiveness of the training. Check with your stakeholders to determine whether the evaluation portion of costs will be allocated to the training department, or could be captured by the department where the individual works.

The Elements of the CBA

Cost and Schedule Estimates

This section provides rough but well-researched estimates of both the costs and the schedule for the training. Expect to answer questions like, "How did you arrive at that figure for the budget?" and "How was the deadline determined?" in this section of the CBA.

Projects are often done in addition to regular work, just like conducting training is, so having an idea of how much time, materials, and other resources are required is a very smart idea. If you have to hire replacement staff to do your regular work while you are delivering training, you have to include those costs as well. A fairly simple way to do that is to figure out how much time will be required and how much that person's time costs per hour.

List of Stakeholders

Here is where you identify all the key influencers such as managers, sponsors, etc. At a minimum, you should include the names and roles of the training manager, key training team members, the sponsor, managers with an interest in the training, and the trainees.

Authority Levels

This section defines who has authority for what, and how the lines of supervision or delegation have been established. This will help project team members understand the limits to their own authority and who they need to approach for help. An organization chart or matrix that outlines the important roles and responsibilities of the project is also useful. This approach can avoid problems such as people deferring responsibility ("Oh, I thought so and so was doing that part of the training") or becoming territorial about parts of the project.

Assumptions and Agreements

Any assumptions that limit the training planned or agreements that form the basis for interaction should be detailed here. Don't leave anything out that could affect the future management of the training project. If you want the project to be a success, all side agreements must be agreed to in the statement of work that is part of this plan, and included with your CBA.

Making Connections

Preparing for the Cost-Benefit Analysis

Make sure that you are aware of the cost controls that impact your training project. These include:

- Budget and/or estimate (in terms of dollars or hours): You are more valuable to your manager when you are aware of what a training program costs.
- Cost milestones and dates: You may decide to divide the money/budget up on a monthly basis or on a resource basis, but having some milestones in place can help determine how well you are doing. For example, if you've spent most of your training delivery budget already but most of the human resources team still has to complete the training, you're in trouble.
- Financial benefits to be obtained: Are there any? Don't say no too hastily, even if they are hard to measure.
- Costs included: Ensure both external and internal costs are represented.
- How do you plan to keep time or dollar costs under control? What can you do to make certain the budget stays within its bounds?

Cost-Benefit Analysis Worksheet

Purpose of Proposed Training (as determined in your meetings with stakeholders so far)

Scope of Proposed Training (what topics, depth, and schedule is proposed)

Training Deliverables (what will this program encompass?)

Cost of Developing the Training Program (including trainer's time, planning meetings, instructional design, writing, editing, proofing, testing the program, and employees' pay)

Cost of Delivering the Training Program (including trainer's time; registrations, cancellations and re-bookings; delivery and execution; follow-up; and reporting)

Financial Savings to be Achieved by Offering This Training (be specific)

This training project has these tasks:

Stakeholders will include:

These assumptions and agreements have already been made:

My communication plan looks like this:

Who?	What?	When?	Where?	Why?	How?

Results Expected

- Specific objectives/results expected in order of importance. Are there any constraints you are aware of?

- Plan for control of results: Probably not in your hands, but try to answer anyway.
- Plan to minimize risks: Again, some risks will be beyond your control. However, there may be other risks that you can keep in control if you know about them.

Approvals Obtained

- Training Manager
- Operations Area Manager (whose people will take the training)
- Training Manager's Supervisor/Director

These levels of approval not only protect you, but also helps to clarify exactly what you are expected to do. Sometimes this helps your manager too, who has not yet taken time to think through a training project they have assigned to you.

Calculating the Return on Investment

The return on investment is often easy to calculate on very practical, skills-based training. It's more challenging with intangible types of training, like what's involved in the soft skills side of things. Having a good idea of where you are starting from by conducting a training needs analysis is important so that you know where you are headed. The cost-benefit analysis is also important so you know what resources and budget you have. Other than that, the training itself is important so that your students are developing skills, knowledge, and attitudes that help them deliver what's needed in the workplace.

Calculating the return on investment might require that you enlist the help of someone in your accounting department. They can help to ascertain the change in financial state for a particular area of the business during a particular period of time. If your training took place a short time ago and no other influences are present, it's more likely that you can say, "Our training in the new techniques for manufacturing cost $50,000 and the return you realized was a 40% increase in production, which resulted in a total increase of $125,000 in product sales, and a net return of $75,000. "

When you are trying to measure intangibles, like leadership training or communication skills training, the return is harder to measure. Instead of being able to demonstrate money, you might be further ahead by revisiting the training needs analysis and responding directly to the gaps. For example, if employee turnover was high, sick days were high, or employee attitudes were contributing to unfinished work, you might need to measure overall employee engagement, absenteeism, incidents of sick leave, or other factors related to the gaps identified.

Presenting Training Results

Getting Ready

What Will We Evaluate?

If you follow the teachings of Donald Kirkpatrick and the continued strength in his model for evaluation, you will see that measuring training results starts even before the training design. By the time you get to this point, it should be relatively straightforward to assess and then present your training results.

When you have implemented the practice of completing a training needs analysis, you will know precisely what gaps you were meant to overcome, and why they existed. You will know the training objectives, and either select (purchase) the training you need, or design and create an appropriate program. Once the training is complete, you can perform a detailed evaluation and present the results to the appropriate stakeholders.

We recommend that you arrange the presentation meeting, or at least chair it so that your presentation is the focus and it doesn't get lost along with other topics. You can make your presentation either in person or online. If the meeting is online, make sure you are familiar with and able to use the technology that is available.

Preparing for the Meeting

Here is a checklist of things that should be done before a training results meeting.

Information Gathering

Have all the information that stakeholders want available, including:

- The results of the training needs analysis
- Pre and post surveys
- Testing completed

- Anecdotal reports

Know Your Audience

- How do they like to receive information?
- Do they need a slide show, notes on a flip chart, or a concise handout?
- Prepare accordingly.

Agenda Planning

- Ensure that the appropriate individuals are invited
- Develop an agenda and set objectives for the meeting

During the Meeting

- Make sure that the meeting starts on time
- Encourage open communication
- Assign a note taker to record what happens during the meeting
- Set some ground rules
- Introduce the members of the training team if they are with you
- Cover one agenda item at a time
- Review the priorities from the training needs analysis and the training objectives
- Review main points of the training program, including goals, budget, and implementation date
- Discuss methods and tools used to meet the objectives and conduct the training
- Briefly discuss any challenges or issues that arose during the process
- Report the evaluation results, including the nuances of a return on investment if that was required
- Agree on and reiterate any follow-up activities or action items

Getting It Right

Seven Ingredients for Effective Meeting Management

A major cause of frustration can be related to ineffective meetings, yet meetings are necessary to exchange information and coordinate activities. In your role as a training professional, becoming known as someone who runs effective meetings is imperative because it is also a reflection on how well you organize your training events and follow through with participants afterwards.

Here are seven ways that you can ensure that your meetings are effective and well run.

1. Always have an agenda and be fully prepared, even if you are doing something as creative as brainstorming. This lets people know what to expect, and that their time is valued by you.
2. Focus on what's important to the entire group during the meeting. If side discussions come

up that don't affect the whole group, schedule them for another time.
3. Take action instead of becoming a group that gets stuck in discussion, and make sure people follow through on commitments.
4. Train group members in communication, problem solving, and conflict resolution so they have the skills needed to be successful.
5. Hold your meetings in places that are free from interruptions and distraction.
6. Encourage open communication through your facilitation skills and attention to your own body language. Make sure that you listen more than you talk.
7. Ask for someone to be a note-taker (or appoint someone) so that you can focus on leading the meeting instead of trying to do both.

If one problem could be said to hamper most presentations, it's the lack of an action step, in which you tell your audience what you expect them to do and when. The action step should be something like, "By Tuesday, I'd like any suggestions in writing because we'll start this plan rolling on Wednesday." It's then clear what you expect and why you wish others to achieve it.

Ground Control

Although you are already a training professional, stakeholder presentations can rattle even the best among us. If the mere thought of speaking to this group makes you break out in a rash, here are some tips to increase your confidence.

- Stand, don't sit. Why? Standing makes you seem more powerful and more energetic. You will project both your voice and your message better when you're on your feet.
- Make up cue cards or visual cues. Use a flip chart or slides to note the key words of the ideas you want to get across.
- Face the audience directly and focus on one person at a time. Effective eye contact means focusing for at least three full seconds at a time on each of your audience members.
- Use your hands. Movement is a critical element of every presentation (but try not to look like you are conducting an orchestra).
- Ask questions to get questions. You need questions to gauge how completely your ideas were accepted. If you ask a couple of questions, it gives the audience time to prepare their own.
- Look around when you answer a question. Look fully at the questioner as they are speaking. Then repeat the question, moving your eyes around the group. This gives you some time to think and include the whole group in your answer.
- Neutralize negative questions. It requires a bit of practice, but you can reframe most negative questions to make them more positive.

Practice Never Hurts

One form of evaluation that rarely takes place is to set the participants up for success when they return to work. This exercise will help them to provide feedback on the training by sharing their thoughts with their own supervisor. It also assists in the learning transfer as they think about what they take away with them and how it will apply in their own jobs.

Further Reading:

- ✓ Guerra, Ingrid, Roger Kauffman, and William A. Platt. *Practical Evaluation for Educators: Finding What Works and What Doesn't.* Corwin Press Inc., 2005.
- ✓ Kirkpatrick, Donald L., and James D. Kirkpatrick. *Evaluating Training Programs: The Four Levels (3rd Edition).* Berrett-Koehler Publishers, 2006.
- ✓ Kirkpatrick, Jim D., and Wendy Kayser Kirkpatrick. *Bringing Business Partnership to Life: The Story of the Brunei Window Washer.* Kirkpatrick Publishing, 2012.
- ✓ —. *Kirkpatrick Then and Now: A Strong Foundation for the Future.* CreateSpace, 2009.
- ✓ —. *Training on Trial: How Workplace Learning Must Reinvent Itself to Remain Relevant.* AMACOM, 2010.
- ✓ Phillips, Jack, and Ron Stone. *How to Measure Training Results: A Practical Guide to Tracking the Six Key Indicators.* McGraw-Hill Education, 2002.