



Measuring and Proving the Value of Learning

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"Learning Scorecard" Collaborative Project

- ▶ eLearnity collaborative research project
 - Sept – Dec 03
 - B&Q, BP, BT, Coca-Cola, HSBC, Marks & Spencer, Vodafone

- ▶ Structure
 - Independent profiling
 - Best practice research
 - 3 Workshops
 - Internal practice, External best practice, Solution synthesis

- ▶ Exec Paper / Slides = Email : **davidw@elearnity.com**

▶ Original Kirkpatrick Model (1959)

- Level 1: Reaction
- Level 2: Learning
- Level 3: Behaviour
- Level 4: Performance

You should already know this!

▶ ROI

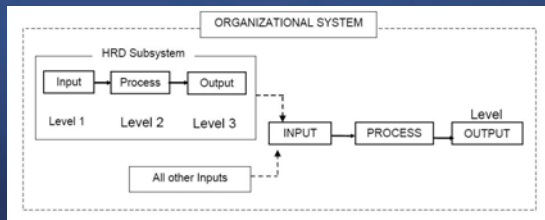
- $\text{Net Benefits} / \text{Total Costs} * 100$
- Expressed as a percentage

▶ Simple Addition

- Level 0: Activity
 - were they there?
 - did they do it?
 - did they complete it?

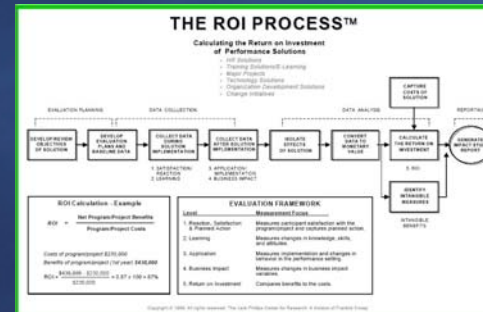
▶ Jack Phillips

- ROI = Level 5 of evaluation
- Graded application
- High profile in US



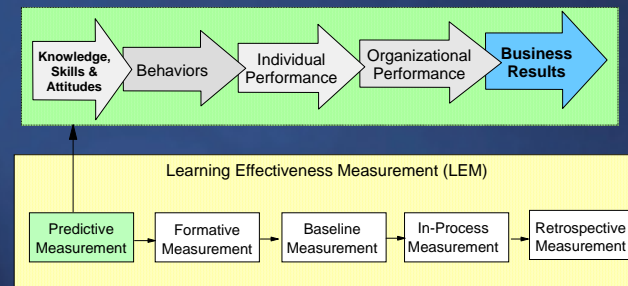
▶ Dean Spitzer (IBM)

- Learning Effectiveness Measurement
- Predictive Focus / Causal Chain



▶ Greg Wang

- Runs ROI.net
- Metrics-based approach



- ▶ Standard reference point is Kirkpatrick (1-4)

- ▶ The Typical Corporate Profile ...
 - Level 1 : Reaction **Generally extensive**
 - Level 2 : Learning **Sporadic, specific programmes**
 - Level 3 : Application **Rare, one or two programmes**
 - Level 4 : Impact **Almost none, some pilots**

- ▶ Variations
 - A couple of organisations had very little focus on L1
 - One organisation was primarily focused on L2 assessment

▶ Kirkpatrick

- The standard training industry communication model
- Missing pieces, implication of false causality, start with L1
- **But is it too ingrained to change?**

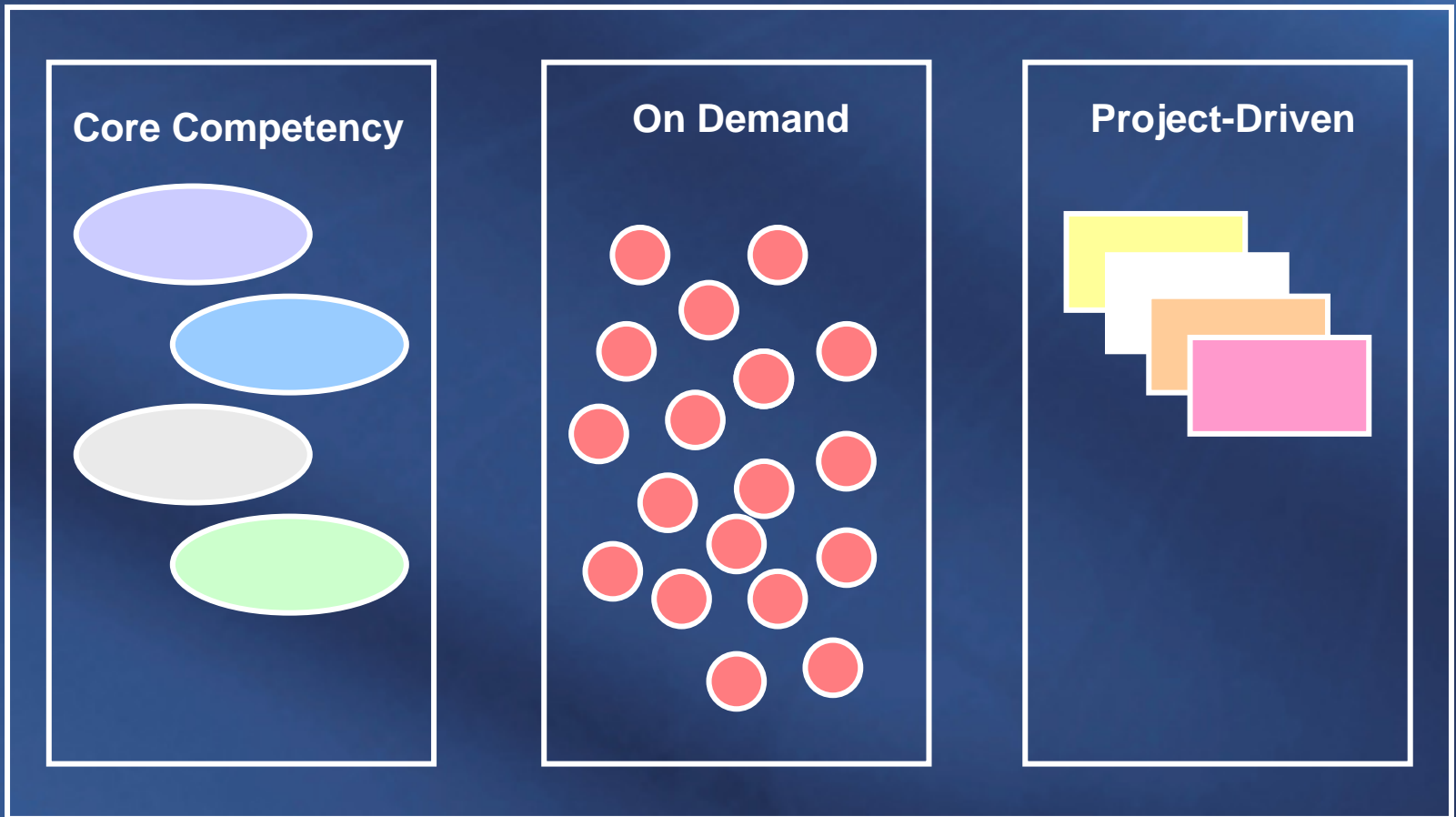
▶ ROI

- ROI is not another level, it's a way of presenting business information
- The ROI equation is simple, it's **the data that isn't**
- Typically **retrospective** and **defensive**
- Very difficult to get to attributable impact data in most cases
- Estimation by learners is just that, an estimate

- ▶ KP L1 (Reaction) is not a measure of value
 - Feedback on the learning process only
 - Some use for learners = opportunity for constructive feedback
 - And learning management = opportunity to tune learning process
 - Should be a background process
- ▶ Not a primary focus for valuable resources unless
 - Specifically demanded by the intervention
 - E.g. pilots, high cost, high sensitivity
 - Sampled in scale
- ▶ Recommend
 - Capture Activity information and focusing on the other levels!

- ▶ **Align** with the business
 - Performance metrics, business scorecard
 - Business credible
- ▶ Be **viable**
 - What's the ROI of working out the ROI?
- ▶ Need to deal with the **specific** and the **general**
 - Core Competency, On Demand, Project-Driven (= the **Learning Portfolio**)
 - Capable of **aggregation**
- ▶ Value can be assessed at **all levels**
 - As can ROI, don't need always to get to KP4
- ▶ More **Predictive** value = Shaping the Future
- ▶ Some **Retrospective** value = Analysing the Past

Aggregated Learning Evaluation Framework



- ▶ Core Competency
 - The business defines the value (the Human Capital / Asset)
 - The value of the learning = the increasing value of assets
 - Learning is an ongoing process not an event!
 - L&D is not responsible for performance, the business is!
- ▶ On Demand
 - Measure activity and successful completion
 - Meaningless to value in the specific, must be in the aggregate
- ▶ Project-driven
 - Need specific measures of outcomes up-front
 - Type of outcomes depend on the project
 - The project should put a value on those outcomes

- ▶ Value = Issue Units x Exchange Rate

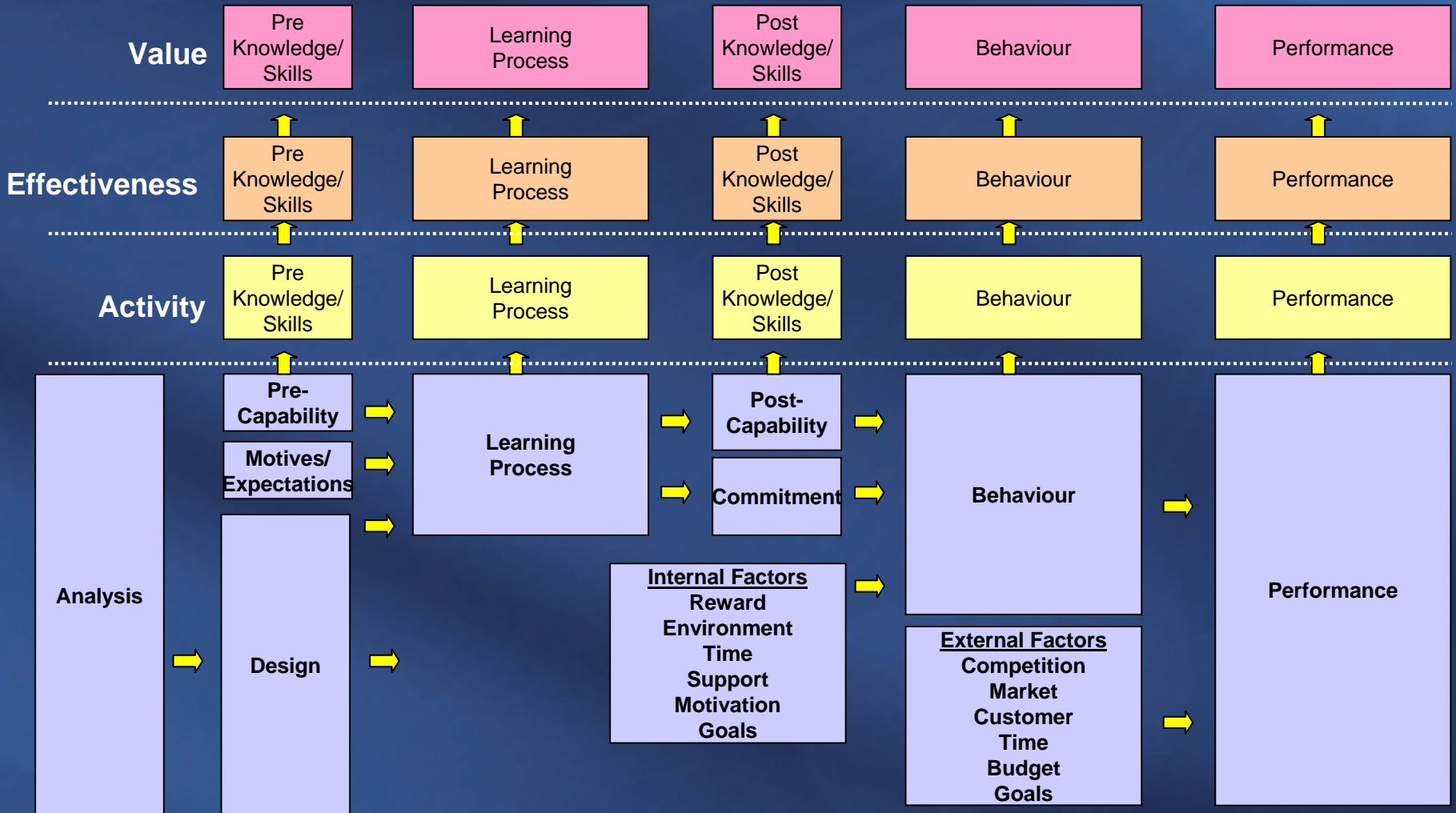
- ▶ Issue Unit = Units of measure of outcome
 - Could be learning, behaviour or impact depending on portfolio

- ▶ Exchange Rate
 - Standard value for that Issue Unit

- ▶ Types of Outcomes
 - Intangible = can't define the Issue Unit
 - Tangible = can define the Issue Unit but not an Exchange Rate
 - Commercial = can define both


Valuing the Learning Portfolio	Core Competency	On Demand	Project-Driven
Driver	Organisation	Individual	The Business Project
Success	Performing role with requisite knowledge/skills	Addressed specific learning needs	Meet specific project learning goals
Level of Assessment	Behaviour (L3) & Learning (L2)	Learning (L2)	Defined by project Often Impact (L4)
Valuation	Organisationally (Human Capital)	Aggregated (Benchmarked)	Directly (Outcomes)

Learning Evaluation Framework



Learning Scorecard	Core Competencies	On Demand Learning	Project-Driven Learning
Value			
Effectiveness			
Activity			

Benefit and Cost Factors



Benefit ID: Factor Title: Unit of Measure:

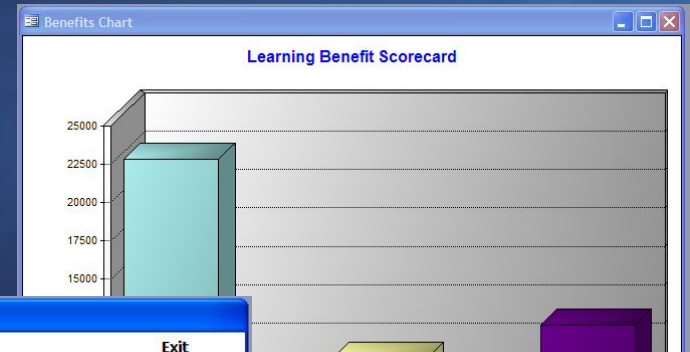
Type: **Cost Factor** | **Benefit Factor**

Cost Factor: This represents a cost of the learning
Benefit Factor: The objective is to lower the current value


Description: A decrease in the number of calls that a... because they don't have the skills, know... is measured in the cost of the staff time a...

Hints and Tips on this factor: You can get the data to underpin this ben... systems in the Call Centre. It is usually av... Ask Jim Woodward on Extension 2343 fo... This factor was accepted and used as ju...

Record:



eLearnimity Learning Evaluation



Learning Evaluation System

Welcome to e-Learnimity Learning Evaluation website.

This site allows Learning Professionals to access data on their learning projects and to assess them against a known list of benefits.

The site is updated automatically when new benefits are added and can produce detailed reports for individual projects or for an entire learning catalogue.


NEW - The Retail Sales benefits list has been comprehensively reviewed and updated. Validation is not yet complete by the Retail Oversight team, so please take care with the figures.

! NOTE - The Learning Scorecard report is off-line whilst we make some substantial improvements. It will be available again from 10:00 on Friday.

Manage Projects | Learning Scorecard

Use the buttons above to access the list of projects and their benefits.

To change any of the other data used in the system, or to view reports, use the right hand menu.



Learning Project Evaluation

Advanced Referral Techniques

Project Sponsor: Sara Hutchinson

A decrease in the number of referrals which are rejected by the Sales team as being inappropriate.

Accurate Referrals

An increase in the accuracy of the referrals made to another sales team so that the customer opportunity has been accurately identified and time is not wasted in re-referrals or lost opportunity. Measured by an increase in the close rate of referrals.

Starting Position	Target Position	Current Position	Value per Unit	Assigned %	Target Saving	Current Saving
870	1280	1025	£145	100%	£59,450	£22,475

Classroom Hire

The cost of hiring/using a classroom for each iteration of the event.

Starting Position	Target Position	Current Position	Value per Unit	Assigned %	Target Saving	Current Saving
0	4	2	£95	100%	-£380	-£190

Total Target	Total Current
£59,070	£22,285

- ▶ Further Research = developing & validating further
 - Piloting in specific organisations / projects
 - Philosophy / Process / Tools / Application
 - Please email me if you would like to explore further

- ▶ Also a public domain Executive viewpoint paper

- ▶ Information on becoming a research client
 - Access to underlying research and tools
 - Access to other research areas, content and market analysis

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