

# ChangeMetrics Evaluating Training Effectiveness and Impact

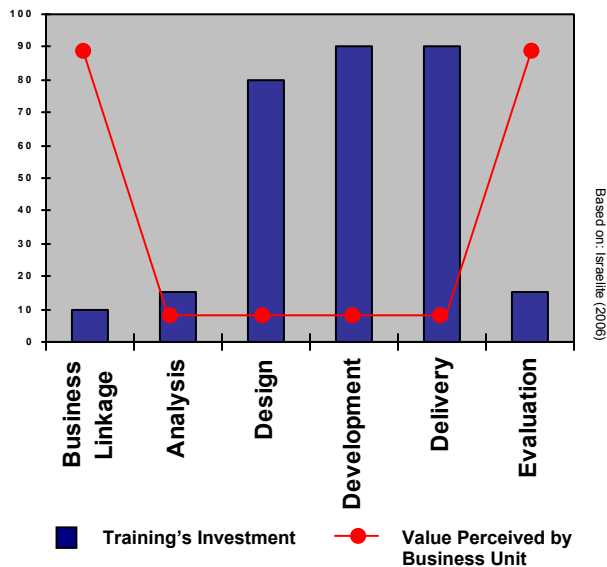
## Evaluation of Training

In many organizations today, the evaluation of training is an afterthought. Yet, research has shown that demonstrating *training's impact on the business* is critical to the willingness to invest in a training effort. The chart below represents the amount of resources that learning departments spend on training-related activities versus what their clients most value. This data highlights the significant gaps between spending and what the business views as most valuable. ChangeMetrics addresses the gap.



### How Business Leaders View Training

The bars below represent the amount of resources that learning departments spend on major activities, while the line represents what their clients most value.

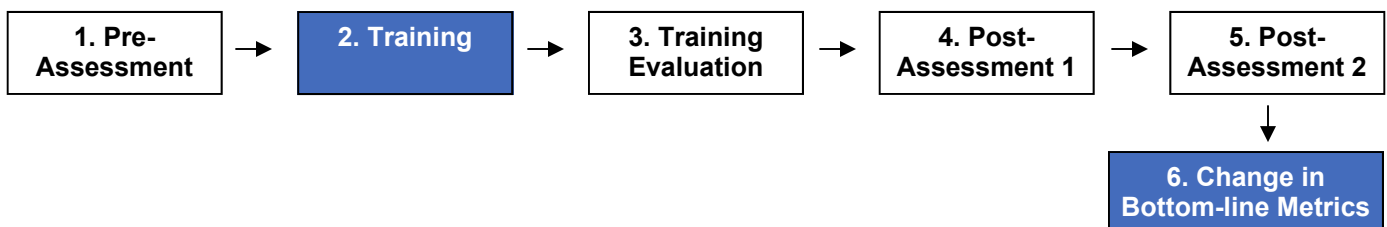


## Kirkpatrick's Four Levels of Training Evaluation

Kirkpatrick's evaluation model provides a framework for measuring the impact of training. The four levels measure:

1. **Reactions**—what the learner thought and felt about the training
2. **Learning**—the resulting increase in knowledge or capability
3. **Transfer**—extent of behavior change observed through actual job performance
4. **Results**—the effects on the business resulting from the trainee's performance

## ChangeMetrics collects information to address each level of the Kirkpatrick evaluation



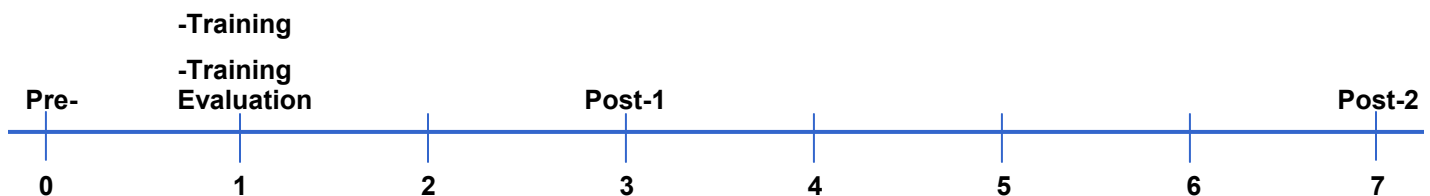
### The ChangeMetrics Strategy

ChangeMetrics follows a six-step approach to measure the effectiveness of training and bottom-line impact on the organization. This approach relies on assessment of behavior change at key points before and after the training intervention. Assessment of the target employees by both themselves and their managers provides valuable perspectives on how the target employee is performing relative to the key behaviors being assessed, as well as the gaps between the self and manager assessment.

### Assessment Tool

|                     |   |   |  |
|---------------------|---|---|--|
|                     | <b>BEHAVIOR 1</b><br><i>IMPORTANCE</i><br><small>Identifies appropriate solutions for customers based on stated needs or issues</small> | <b>BEHAVIOR 2</b><br><i>IMPORTANCE</i><br><small>Identifies opportunities to cross-sell additional services</small> | <b>BEHAVIOR 3</b><br><i>IMPORTANCE</i><br><small>Follows up with customers to ensure needs are met</small> |
| Importance Ratings  | Select  | Select  | Select   |
|                     | Select<br>0 - Not Important<br>1 - Minor Importance<br>2 - Important<br>3 - Critical  |   |  |
|                     | <b>BEHAVIOR 1</b><br><i>SKILL LEVEL</i>   | <b>BEHAVIOR 2</b><br><i>SKILL LEVEL</i>   | <b>BEHAVIOR 3</b><br><i>SKILL LEVEL</i>  |
| Skill Level Ratings | Select  | Select  | Select   |

### Project Timeline (in Months)



### The ChangeMetrics Process Summary

- 1. Pre-Assessment:** Target employees are assessed on behaviors that are the focus of the change effort. Self and supervisor ratings are collected. This assessment should take place within two weeks of the training intervention.
- 2. Training Intervention:** Target employees participate in the training intervention.
- 3. Training Evaluation:** Target employees complete the training evaluation. This evaluation should be completed within one week of the training intervention, and ideally immediately after the training.
- 4. Post-1 Assessment:** Target employees are again assessed by self and supervisor on the behaviors that are the focus of the change effort. This assessment should take place six to eight weeks after the training intervention.
- 5. Post-2 Assessment:** Target employees are again assessed by self and supervisor on the behaviors that are the focus of the change effort. This assessment should take place six months after the training intervention in order to assess extent and sustainability of change over the long term.
- 6. Bottom-Line Results:** Organizational measures of performance, or quantitative metrics, are collected at the organizational and/or individual level at the time of each assessment. The tracking of these metrics over time enables measurement of the ultimate impact of training on business results.

## ChangeMetrics and the Kirkpatrick Evaluation Model

### How ChangeMetrics Collects Information at Each Level of the Kirkpatrick Model



| Kirkpatrick Level         | The ChangeMetrics Method of Measurement             | The What, Why & How of Measurement  |
|---------------------------|---|---|
| <b>Level 1: Reactions</b> | Training Evaluation Survey                          | <ul style="list-style-type: none"> <li>Assesses learner satisfaction with training</li> <li>Measured by surveying learners post-training</li> <li>Reason to evaluate: Participant reactions affect learner motivation and have important consequences for learning</li> </ul>   |
| <b>Level 2: Learning</b>  | Comparison of Skill Level Pre- and Post-Training    | <ul style="list-style-type: none"> <li>Assesses the extent to which trainees' self assessment &amp; manager assessment of skill level has increased</li> <li>Assesses the gap between manager and trainee skill level assessments and the extent to which the gap decreases from pre-training to post-1 to post-2 measurements</li> <li>Measured by surveying learners and their managers both pre- and post-training</li> <li>Reason to evaluate: Indicates the impact of training on skill level</li> </ul> |
| <b>Level 3: Transfer</b>  | Comparison of Importance Assessments Over Time      | <ul style="list-style-type: none"> <li>Assesses the extent to which trainees' and managers assessment has increased over time</li> <li>Assesses the gap between manager and trainee assessments and the extent to which the gap decreases from pre-training to post-1 to post-2 measurements</li> <li>Measured by surveying learners and their managers both pre- and post training</li> <li>Reason to evaluate: Measures the transfer from learning to actual observed job performance</li> </ul>            |
| <b>Level 4: Results</b>   | Tracking Quantitative Performance Metrics Over Time | <ul style="list-style-type: none"> <li>Assesses the extent to which specific quantitative measures of performance (e.g., sales, cost, accidents, quality, etc.) have changed over the period from pre-training to post-1 to post-2</li> <li>Measured by gathering quantitative metrics from the organization, preferably specific to each learner, at the three time periods (pre-, post-1 and post-2)</li> <li>Reason to evaluate: Measures the ultimate impact on business results</li> </ul>               |

### ChangeMetrics Results

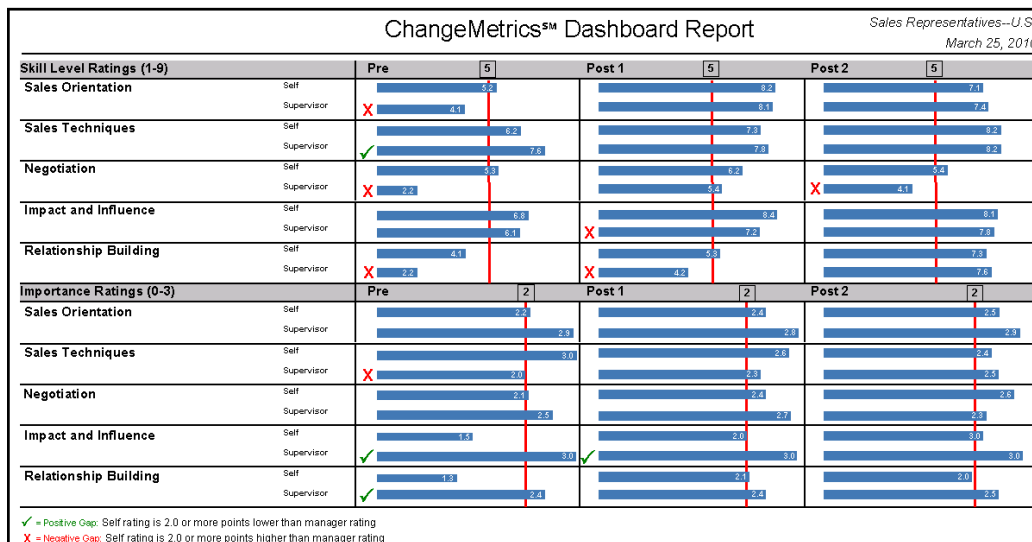
The value of the ChangeMetrics process is in showing exactly how the training has impacted trainees and changed critical skills and behaviors over time, and ultimately impacted the organization’s bottom line. ChangeMetrics presents this data in a meaningful and powerful way through a series of reports that are produced at key points during the process. These reports enable organizations to view change over time at both a high-level as well as more detailed level.

**Dashboard:** This report presents a high-level view of assessment data in a short, at-a-glance format. In addition to ratings from the self and manager at the competency level, the dashboard highlights the change in ratings over time and significant gaps between the self and manager ratings.

**Detail:** Similar in format to the dashboard, this report expands upon the information by presenting the assessment data at the item level (i.e., ratings from each question on the assessment). This report allows a “deep dive” into the assessment data to help identify specific issues and focus areas.

**Training Evaluation:** This report presents a summary of trainees’ perceptions of, and reactions to, the training itself. This information is critical to ensuring that the learning process is effective and that there are no obstacles to behavior change due to any aspect of the training.

### ChangeMetrics Dashboard Report



### Summary of Reports

| Report              | Summary Level | Description   | Pre- | Post-1 | Post-2 |
|---------------------|---------------|---|------|--------|--------|
| Training Evaluation | Group         | Summary of group responses to training  | X    |        |        |
| Dashboard           | Group         | 1-2 page report that presents assessment results at the competency level as well as external quantitative measures                              | X    | X      | X      |
| Dashboard           | Individual    |   |      | X      | X      |
| Detail              | Group         | 10-15 page report that presents assessment results at the behavior level and competency level. Does not include external quantitative measures. | X    | X      | X      |
| Detail              | Individual    |   |      | X      | X      |