How to create an L&D Strategy from scratch

Lesson 3 out of 5

Creating L&D Goals and Metrics

KENJO

LESSON 3:
Creating L&D Goals and Metrics

Post Lesson Activity A: Measuring Impact for an L&D Intervention

HOW TO USE THIS GUIDE

This guide includes a template that you can use whenever you would like to create goals and measure impact of a specific L&D intervention. An L&D intervention can consist of anything from a standalone coaching to a long term leadership development program.

WHY DO IT?

Tracking the impact of each L&D intervention will give you information on whether that intervention is achieving the desired goals. This allows you to take action to improve on or change the approach.

Additionally, if the goals of your L&D interventions are fully aligned to your L&D strategy, you can consolidate the impact measurements across the interventions to track the impact of your overall L&D strategy.

WHAT YOU'LL NEED

- The table from Step 3 of Lesson 2 Post Lesson Activity B: Critical Gap and Prioritisation Analysis that lists the details behind the intervention you would like to measure. This would include:
    - Target Knowledge, Skills and Abilities (KSAs)
    - Target Audience, Employee Group or Role
    - Reason for importance
    - % of Target Audience already Proficient
- Access to the accountable "Champion" for the L&D intervention. See Step 6 of Lesson 2 Post Lesson Activity B: Critical Gap and Prioritisation Analysis.
    - Note: If you did not complete this step, the Champion is simply a person that is accountable for the success of the intervention. This may be the team lead, function head or employee representative of your target audience.
- If you are working as a team, you'll need a place to work and document results such as a miro workspace or confluence document

AGENDA

- Identify desired impact
- Design the evaluation method

STEP 1: IDENTIFY DESIRED IMPACT

Instructions:

- If you are using an online whiteboard or notebook, carve out a section and replicate the tables as seen below
- Fill out the **Background Information** that can be derived from **Step 3 of Lesson 2 Post Lesson Activity B: Critical Gap and Prioritisation Analysis**
- Identify your **Desired Impact** by assessing success metrics
- Keeping the desired impact in mind, pick your **Level of Evaluation**

BACKGROUND INFORMATION	
Target Knowledge, Skills and Abilities (KSAs)	E.g. Basic Managerial Skills
Target Audience, Employee Group or Role (% of Target Audience already Proficient)	E.g. First time leaders (10% proficient)
Reason for importance	E.g. Increased employee turnover rate and low managerial satisfaction scores

DESIRED IMPACT	
What would success with this intervention look like?	E.g. 80% of participants are proficient at new skill or sales of ergonomic office chairs go up 10%
Among the success metrics identified, which ones can be directly impacted or influenced by the L&D intervention?	

Which level of evaluation is suitable? (Ft. Kirkpatrick Evaluation's Model)

Note: The higher the level, the more vigorous the evaluation. The prerequisites for each level are stated below. If you cannot meet the prerequisites, choose a lower level of evaluation.

	Level 1: Reaction	**Level 2: Learning**	**Level 3: Transfer**	**Level 4: Results**
Goal	Understand learner engagement and track internal customer satisfaction	Track acquisition of new knowledge	Track transfer of new knowledge into daily work	Understand the impact of the intervention
Prerequisites	Survey platform Generic survey questions Willing survey participants Attendance data and completion rates	Custom scenarios or quizzes for the participants to test their knowledge Willing participants	Survey platform Customized survey questions Willing survey participants (including participants, participant's line managers/peers, participant employees etc.) Long time frames of more than 3 months	Clear target business metric(s) or desired impact Control group/ condition i.e. a group of similar employees that did not participate in the intervention
Effort Level	Low	Medium - High	High	Low - Medium
Place a tick at your chosen level of evaluation!				

STEP 2: DESIGN THE EVALUATION METHOD

After you have chosen your desired impact and level of evaluation, it is time to design the appropriate evaluation method. In this section, we have provided guides and checklists for you to design your evaluation. The guides are structured by level of evaluation.

Feel free to skip ahead to the level of evaluation that you have chosen for this intervention!

LEVEL 1: REACTION

Instructions:

- Read through the key metrics that are collected at Level 1 and choose the ones that you would like to track
- Read through the sample questions to evaluate learner engagement and satisfaction
- Then, create your own survey questions! A quick online search using the term "sample questions for training evaluation" will give you plenty of great questions to select from

KEY METRICS	
Sign-Up Rates	[(no. of people who signed up)/(no. of people in target employee group)]*100
Attendance rates (per session of the intervention) Note: This lets you know when you start to lose people i.e. which section to redesign	**Session 1:** [(no. of people who turned up for session 1)/(no. of sign ups)]/100 **Session 2:** [(no. of people who turned up for session 2)/(no. of sign ups)]/100
Completion rates	[(no. of people who completed)/(no. of sign ups)]/100
LEARNER ENGAGEMENT AND SATISFACTION NOTE: THIS IS NORMALLY DONE VIA SENDING OUT A SURVEY	
Sample questions: ● I found the course materials easy to navigate ● I will be able to immediately apply what I learned ● My learning was enhanced by the facilitator ● I will recommend this course to others (Note: this gives you your NPS) What questions will you use?	

LEVEL 2: LEARNING

Instructions:

- Reflect on the questions outlined below
- Create a learning test with clear proficiency criteria and a clear communication about what happens if they do not "pass"
- Choose a time frame to apply the learning test

What knowledge or information would you like them to be able to recall or know by heart?	
What can you do to test their acquisition of the knowledge?	E.g. Post-training quiz, observed and graded roleplay, case study, self-reflection exercises etc.
What measure will you use to measure proficiency? Note: Check that it is highly linked to the success metric identified in step 1	E.g. Pass/Fail, Score of at least 60%, etc.
What happens if the participants "fail" your learning test?	E.g. Inform the participants, Have them retake the training, Pay for half of the training etc.
When will you apply this evaluation?	E.g. Last session of training, 3 months after coaching ends etc.

LEVEL 3: TRANSFER

Instructions:

- Reflect on the questions outlined below
- Design an evaluation method for transfer of learning
- Select a time frame for the transfer evaluation

What knowledge or information do they need to apply back to their daily work?	E.g. Feedback giving, Collaborative mindset etc.
What situations will they be able to apply their new learnings to?	E.g. In cross-functional project work, In 1 to 1s etc.
Who will be able to give feedback on their application?	E.g. Cross-functional project team mates, direct reports
How can their application of new learning be measured?	E.g. 360s, self report "I use the skills taught in my day to day work", manager interview/report, pulse feedback
What does successful transfer look like? Note: Check that it is highly linked to the success metric identified in step 1?	E.g. 360 scores on the relevant measures increase, or qualitative feedback from peers indicate increase in frequency of new behaviors
When will you apply this evaluation? Note: min of >3 months after intervention	E.g. Manager interviews at the 3 month and 6 month timeframe

LEVEL 4: RESULTS

Instructions:

- Reflect on the questions outlined below
- Create a way to compare results between the control and intervention group
- Identify the time frame by which you want to evaluate the results

What are the desired targets/business metrics to be influenced? (Note: link to desired impact in step 1)	E.g. Sales of ergonomic chairs, Employee satisfaction scores on development opportunities, or Leadership satisfaction
Who will be in your control group?	E.g. Half of the team will go through the intervention as a first cohort (randomly selected). The rest will be the control group
How will you compare the difference in results between the two groups?	E.g. Compare scores for control vs intervention group from 360 employee engagement scores, compare sales data differences
What would success look like?	E.g. 360 engagement scores for intervention group are significantly higher than scores for control group
When will you apply this evaluation?	E.g. Quarterly sales targets, mid-year engagement survey etc.

The
End!

Congratulations on completing the post activity exercise “Measuring Impact for an L&D Intervention”!

Now that you have completed this and are armed with an ability to measure impact, it’s time to move on to learn how to create a kick-ass learning journey!

Look out for lesson 4: “Learning Journeys: How to think about them and what can L&D offer?”. We’ll go over how to create an engaging and impactful learning journey for all the learning priorities you had identified in lesson 2.

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