Real Learning Measurement:
## Go Beyond Checking the Box

2020

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Introduction

Let's face it, Learning and Development for organizations is not easy. Companies spend vast amounts of time, energy and effort to create and deliver learning. What do they get in return? Most companies have no idea. Only half the companies in Brandon Hall Group's 2019 Learning Measurement Study say they are either effective or very effective at measuring their formal learning programs. It's far, far worse when it comes to informal (15%) and experiential (24%) learning.
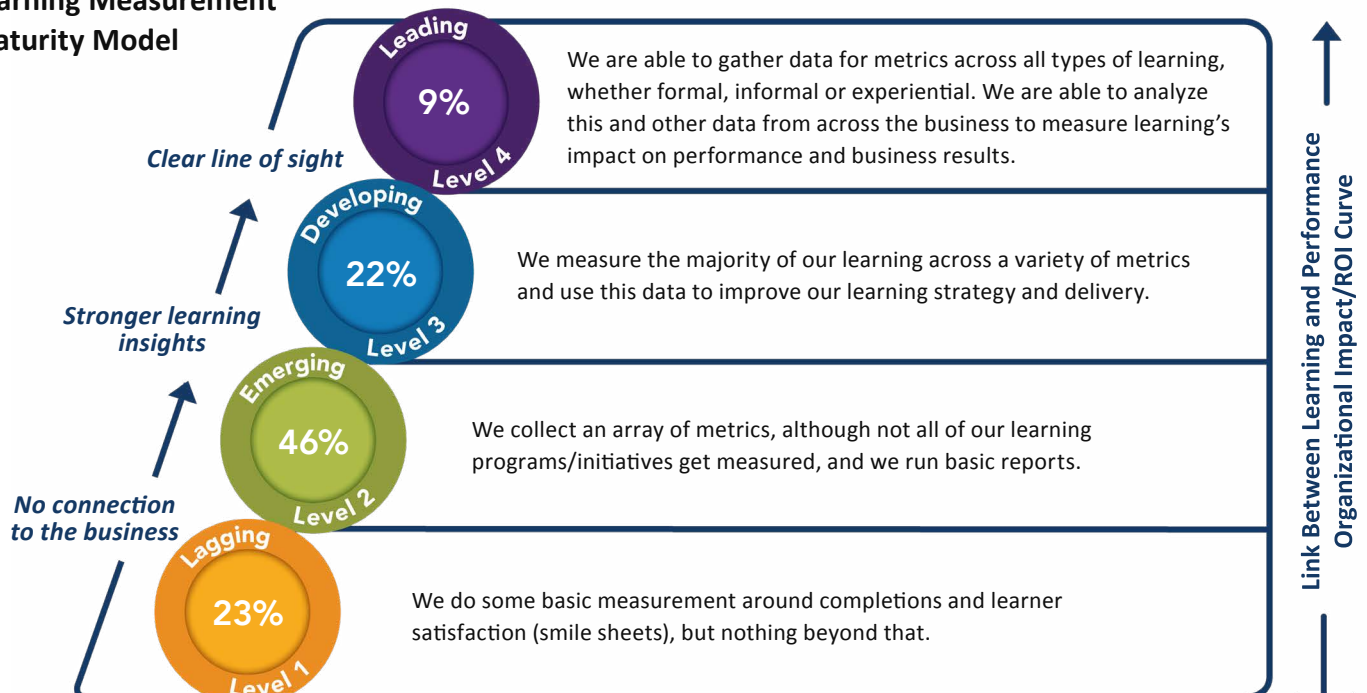
Effectiveness of Learning Measurement

- ● Not at all
- ● Somewhat
- ● Moderately
- ● Highly

Source: 2019 Brandon Hall Group Learning Measurement Study

Formal: 10%, 40%, 34%, 16%

Experiential: 46%, 29%, 16%, 8%

Informal: 53%, 32%, 12%, 3%
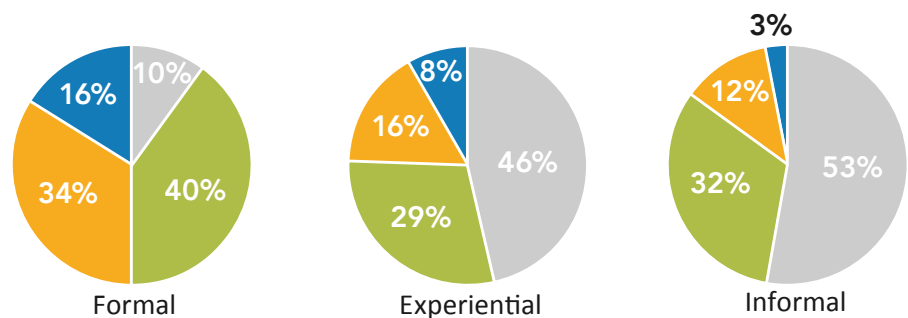
Most organizations don't have very mature learning measurement strategies or approaches. Many companies focus on very basic measurements such as course completions or learner feedback. They are mostly "checking these boxes," relying on the idea that if a learner finishes a course, it is effective by definition. Very few companies take a deeper look at learning and its impact on the business. Mature organizations pull data from across the business to identify real results and become more predictive.

Learning Measurement Maturity Model

Clear line of sight

Leading — 9% — Level 4: We are able to gather data for metrics across all types of learning, whether formal, informal or experiential. We are able to analyze this and other data from across the business to measure learning's impact on performance and business results.

Stronger learning insights

Developing — 22% — Level 3: We measure the majority of our learning across a variety of metrics and use this data to improve our learning strategy and delivery.

Emerging — 46% — Level 2: We collect an array of metrics, although not all of our learning programs/initiatives get measured, and we run basic reports.

No connection to the business

Lagging — 23% — Level 1: We do some basic measurement around completions and learner satisfaction (smile sheets), but nothing beyond that.

Link Between Learning and Performance Organizational Impact/ROI Curve
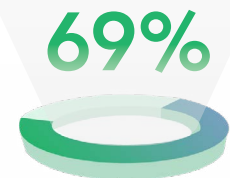
Source: 2020 Brandon Hall Group

There are numerous reasons why organizations seek to measure learning but the most common is looking inward as businesses try to improve their learning programs. However, two-thirds of companies are attempting to improve the link between learning and the performance of the organization. More than half want to improve learning's link to individual performance. Improving performance is arguably the sole purpose of L&D, but to understand learning's impact, we must gather the proper data — and a lot of it — then do the analysis to show us what is happening.

Somehow, organizations are convinced that learning programs are effective simply because they exist, so they only need to measure whether people completed the program to prove its value. As a result, the most commonly used metric for learning is course completion. While it is important to track this, it tells us nothing about the effectiveness of the course by itself. It is simply a measure of the efficiency of learning, not its efficacy. This lack of true measurement doesn't just blind companies to learning's impact; it can actually hamper the goals learning is trying to achieve.
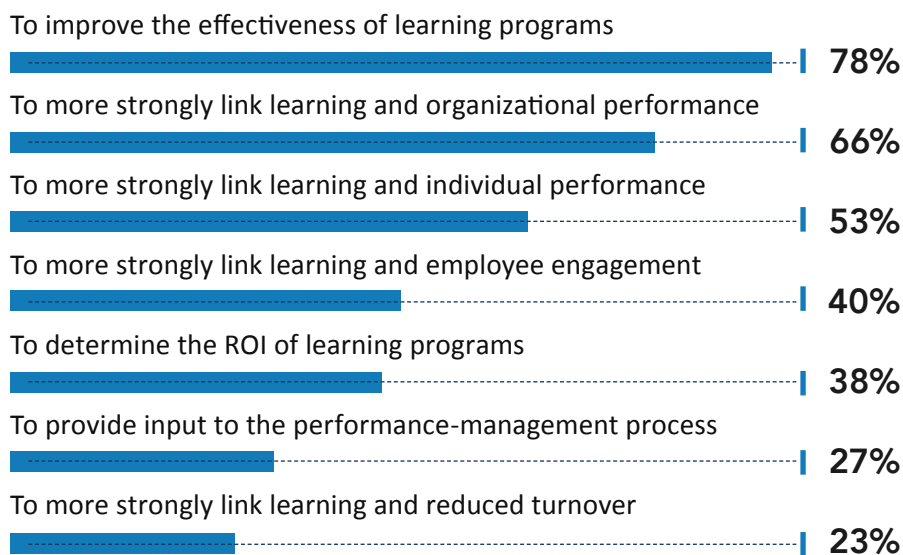
In our research, we see high-performing companies with strong KPI performance are far more likely to include a framework to measure success in their learning strategy.

More than two-thirds of companies say that an inability to measure learning's impact represents a challenge to achieving critical learning outcomes.

69%

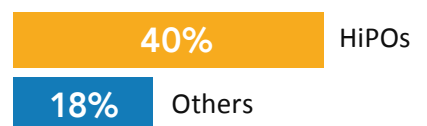Source: 2019 Brandon Hall Group Learning Strategy Study

These "HiPO" companies are also more likely to use outcomes such as employee engagement, individual performance and meeting corporate objectives as direct measures of their learning effort, so it can be done. It just takes planning, strategy and the right tools to make it happen.

Drivers of Learning Measurement

To improve the effectiveness of learning programs
78%

To more strongly link learning and organizational performance
66%

To more strongly link learning and individual performance
53%

To more strongly link learning and employee engagement
40%

To determine the ROI of learning programs
38%

To provide input to the performance-management process
27%

To more strongly link learning and reduced turnover
23%

Source: 2019 Brandon Hall Group Learning Measurement Study

Does your Learning Strategy include a framework to measure success?

| 40% | HiPOs |
| 18% | Others |

Source: 2019 Brandon Hall Group Learning Strategy Study

Learning Measurement

Organizations must first deal with the reasons they may not be measuring learning effectively. Brandon Hall Group's 2019 Learning Measurement Study found about 43% of companies are not doing measurement at Kirkpatrick Level 4 — the degree to which targeted outcomes occur as a result of the training event and subsequent reinforcement; and 30% are not measuring at Level 3 — the degree to which participants apply what they learned during training when they are back on the job. For those companies that are doing Level 3 and 4 measurement, it is only for a fraction of their learning programs. Why is this?

Outcomes Measured Consistently

● HiPOs ● Others

Outcome	HiPOs	Others
Employee engagement	28%	12%
Individual performance	26%	15%
Team effectiveness	19%	8%
Ability to respond to market	18%	6%
Rate of knowledge transfer	17%	5%
Voluntary turnover/retention	15%	6%
Revenue growth	13%	7%
Business process improvement	13%	4%
Profitability	8%	8%
Revenue per employee	7%	4%
Leadership promotion rates	6%	3%

Source: 2019 Brandon Hall Group Learning Measurement Study

Why Aren't We Measuring Behaviors and Impact

- **47%** We don't have the time/staff.
- **41%** We don't have the proper metrics.
- **39%** We don't have the technology to support it.
- **33%** It's too difficult to link learning to outcomes.
- **29%** It is too difficult to assess.
- **25%** We don't use Kirkpatrick at all.
- **4%** We don't see a need.

Source: 2019 Brandon Hall Group Learning Measurement Study

In addition to believing they do not have the time or staff to do this type of measurement, the biggest reason is that companies do not have the proper metrics. This is why they remain stuck on Levels 1 and 2 — there is nothing to measure against. The good news is that only 4% believe there is no need to measure at Levels 3 and 4.

To fix this, companies must entirely rethink their approach to learning. Rather than create a program based upon a perceived training need, learning should work with the business to understand the outcomes learning is supposed to achieve. There must be a business reason why a learning program exists. Perhaps it is to improve sales skills to boost revenue. It could be safety training to reduce accidents and ensure compliance. However seemingly small the learning initiative is, it should be based on business needs.

These business needs must then be broken down into specific performance outcomes for learners based on specific behaviors that make the business outcomes possible. Organizations should be able to identify the specific behaviors or skills employees must exhibit to improve performance.

The learning objectives that will lead to the behavior changes then need to be identified. This is where most organizations begin, without ever thinking about performance or business outcomes. They must develop specific outcomes for learning initiatives that point directly to the desired behavior changes or skill acquisitions.

For example:

- ✓ A demonstrable knowledge of a new sales technique
- ✓ Ability to identify all features of a new product/service
- ✓ An understanding of the use of a new software platform

This approach allows companies to measure against specific baselines and benchmarks, and make changes along the way. Are learning objectives not being met? Course correct quickly, rather than waiting to see if business outcomes materialize. This strategy also helps eliminate perceived challenges with measuring non-formal learning. Traditional measurement models are based on completions, hours and grades. It is almost impossible to apply those measurements to the modern learning experience, so companies simply don't measure. By taking an outcome-based approach, all learning experiences can be measured.

KEY CONSIDERATIONS

1. Metrics come first.

2. Business leaders must help define the metrics of success.

3. The metrics of success apply to all types of learning.

4. More measurement is good; meaningful measurement is better.

5. Focus on performance-based outcomes.

6. Focus on impact, not investment.

At GM, Measurement is Built in

Case in Point

GENERAL MOTORS

General Motors' Center of Learning (CoL) sought to make a concerted effort to align training measurement with the business unit it served to demonstrate the value training brought to the company. The process began with a statement of intent with these goals:

- Use learning and performance analytics to continuously improve the quality and relevance of the training it provides to its retail and wholesale field audiences.

- Build a culture that incorporates measurement thinking and evidence-based practices into all activities and training.

Building on Kirkpatrick and other models, the CoL built its own framework, with "business alignment" added to the intake of every project.

GM's CoL Measurement Strategy Framework:

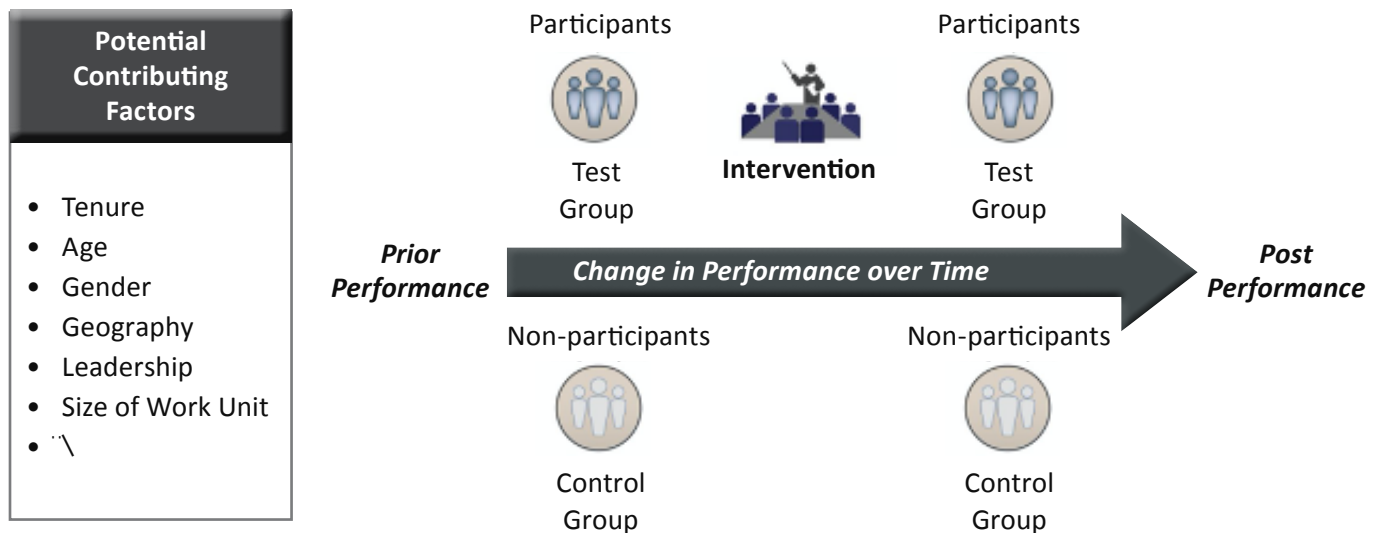| Phase	Description	Level	Purpose
Alignment	Business Alignment		Are we aligned?
Efficiency	Operational	Level 0	How much did we deliver?
Effectiveness	Reaction Learning Gain	Level 1 Level 2	Do they like it? Did they learn it?
Job Impact	Behavior Change	Level 3	Can they do it?
Business Impact	Business Results ROI Optimization	Level 4 Level 5 Level 6	Is it making a difference? What's the return? How can we improve it?

Source: General Motors

Measurement quickly became an integral part of every learning project. Today, when a learning need is identified, the project team must complete a project-intake form that addresses the alignment and level of measurement to pursue. In collaboration with business stakeholders, the project team defines the business goal the initiative supports as well as current and desired states for business-outcome measures and performance indicators.

The more robust impact and optimization studies involve statistical analysis with test and control groups following a quasi-experimental design. Any such analysis involves merging business data with people and training data, further cementing the alignment of training to organizational business goals.

GM's CoL Impact Study Design:

Potential Contributing Factors	Participants / Test Group	Intervention	Participants / Test Group
• Tenure • Age • Gender • Geography • Leadership • Size of Work Unit • ¨\	Prior Performance → *Change in Performance over Time* → Post Performance		
	Non-participants / Control Group		Non-participants / Control Group

Source: General Motors

By adopting the strategy, the CoL has been able to align its initiatives to GM's business objectives in measurable ways. And stakeholders are taking notice.

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At Upside Learning, we pledge to Go Beyond seeing learning solutions as an end marked by boxes being checked off a training to-do list. We see them as a means to an end, where—as a result of the learning solution—employees work better, smarter, and with more awareness of their roles in the big picture, in turn, making a positive impact on the business overall.

With a laser-sharp focus on employee perspectives, and one eye on the business goals, we provide creative solutions rooted in strong ID principles and conceptualized as practical interventions that businesses can implement with ease.

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