IMPACT

Your Performance Improvement Resource from BEI

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Performance Perspectives

An Alternative Method for Level 3 Evaluations

According to the ASTD Benchmarking Forum (1996, 1997), 92% of training evaluations end at obtaining the participants reaction to the course (Level 1, smile sheets), and only 11% of courses are evaluated to determine if job performance has improved initially and on an ongoing basis (Level 3). Yet, in today's economic climate, companies are scrutinizing expenses to ensure that every dollar spent brings value to the company. So, why not training expenses?

> Billions of dollars are spent on training and it is estimated that not more than 10% of the dollars invested in training and development actually result in a change of behavior.
> *(Haccoun & Saks, 1998)*

Level 3 training evaluations, and, for that matter, Level 4 (business impact), are perceived as difficult and costly to design, develop and conduct. In addition, employees often feel that these evaluations indicate that they are not trusted to learn and apply what they have learned to the job. Nevertheless, evaluating training is critical. Therefore, is there an alternative method for doing Level 3 evaluations?

One alternative would be to integrate training evaluation directly into day-to-day processes (i.e., MBO, performance management, assessments, Balanced Scorecard) rather than treat them as one-off events. Several elements need to be in place in order for this to occur:

- Aligned objectives
- Appropriate measurements
- Managerial support

Aligned Objectives

First and foremost, performance objectives have to be aligned with the objectives of the company. Why should a company invest in training that does not align with its strategies and deliver desired performance improvement and business results? To be effective then, the training objectives, and hence the performance objectives, must be designed to meet the business needs. In order to accomplish this, the company has to be cognizant of the individual and combined learning needs of the employees, departments, and the company as a whole. In addition, employees need to understand the connection between their new skills and knowledge and the company's vision. If employees are able to comprehend how their training gains link to the company's business goals, the training will be more relevant and met with eager anticipation rather than resistance. Integrating training evaluation directly into day-to-day processes will allow everyone to focus on applying their new skills and knowledge to the company's key priorities and goals.

Appropriate Measurement

The second element that has to be in place to integrate training evaluation directly into day-to-day processes is the appropriate approach to measuring performance gain (how and where). That is, the measurement of the performance must be objectives-oriented (also known as behavioral-based). The distinguishing feature of an objectives-oriented measurement approach is that the purposes are specific and the measurement focuses on the extent to which these purposes are achieved. To be objectives-oriented the measurement must be relevant and important (aligned), tied to job responsibilities and accountabilities, and include:

1. Observable behavior
2. A description of the performance standard
3. The conditions under which performance is to occur
4. A family of measures: finance, output, input, reaction, and time

The second part of the Appropriate Approach element is to determine the best day-to-day (standard) process(es) in which to observe and assess the objectives (e.g., project status review meetings, monthly staff meetings, performance management, interim feedback meetings).

> **Business Strategy:** Zero tolerance for unsafe work practices.
>
> **Part of the Action Items:** Course on Unsafe Work Practices and one on Conducting a Safety Audit.
>
> **Employee Objective:** Carry out safety audits within three weeks of request. Measurements:
> - Requesting manager's satisfaction (no complaints)
> - Meets criteria on audit checklist
> - No observed unsafe work practices in that unit for a period of six moths from time of audit

Managerial Support

Research reveals that even when objectives are aligned and the measurements appropriate, if the work environment does not support the learned behavior, then the transfer of training to on-the-job performance most likely will not 'stick'. If employees are met with negative consequences when attempting to apply new learning, then the chances are fairly good that the employee will revert to old habits, wrong behavior, or withdrawal.

As an example, a study conducted by Motorola, Inc. concluded that in plants where quality improvement training was reinforced by senior management there was a $33 return on every dollar invested. But plants providing the same training without top management follow-up produced a negative return on investment.

Likewise, in an earlier Xerox Inc. study only 13 percent of skills were retained by trainees six months after training when managers failed to provide coaching and support as the skills were being applied. However, job coaching and managerial support is something that must already exist within a company's culture. In some cases, it may be necessary to assess and modify the culture to train management to reinforce desired performance.

Conclusion

To ensure that training brings value to and impacts performance improvement and business results, ongoing evaluations need to become an integral, rather then optional, component of conducting business. In order to do this, the three elements mentioned above must be defined during the analysis and design of the training course. Instructional Technologists, subject matter experts, and managers with a vested interest need to be part of this definition phase. There must be buy-in on everyone's part on the:

- Expected performance improvement and business results impact in alignment to the company's goals and objectives
- How and where performance gains will be measured
- How and by what means managers will support and model the application of learning back in the workplace

If you're looking for an alternative method for Level 3 training evaluations, consider integrating the elements mentioned in this article into your organization's day-to-day processes.

From Strategy to Action

By sharing client projects and **BEI** solutions, our goal is to offer you insight and information to increase your success at moving from strategy to action on your performance improvement projects. The elements of this section include a brief description of the client organization and their challenge, critical success factors or the expectations for the project, solutions for meeting the critical success factors, and the lessons learned or what we would do differently if we did the project again.

Description of Company
An automotive joint union and management group responsible for making provisions for the safety and health of its employees during the hours of their employment.

Challenge
Develop an ergonomic surveillance tool interface, and design and develop training for applying the interface and Ergonomic Surveillance Tool (EST). The surveillance tool identifies and prioritizes job risk factors present and identifies what jobs need further ergonomic analysis for redesign. The target audience for the tool, interface, and training are all Local Ergonomics Committees (LECs) located within the manufacturing facilities of an OEM and a Tier 1 Supplier. The Client was a team of five individuals with varying levels of involvement and expectations.

Critical Success Factors
The Design and development of the interface and training required these critical factors:

- Integrate the developers of the EST (they were the SMEs) into design of interface and training
- Fit need and context of multiple manufacturing facilities and jobs. Manufacturing facilities constituted stamping, component manufacture, vehicle assembly, and Powertrain
- Understand the purpose of the tool as one of evaluation and validation (not as a definitive decision-making tool)
- Learners quickly and accurately observe and identify all inputs to the tool
- Achieve 85% consistency of observation
- Acquire competency in using the tool and interpreting the results

Solutions
To accomplish the challenge and to satisfy all the above stated requirements, the following solutions were implemented:

- Usability concepts drove the design of the tool interface and training
  - ➢ User centered design
  - ➢ Make things visible
  - ➢ Follow natural mapping
  - ➢ Use both knowledge in the world and knowledge in the head
  - ➢ Exploit the power of constraints, both natural and artificial
  - ➢ Simplify structure of tasks
  - ➢ Design for error
  - ➢ Standardize
- Video mpg files representing the four manufacturing entities were embedded into training material for both structured activities as well as instruction
- Training focused on concepts of focused observation
- Training design was 70% activity and 30% lecture
- Subject matter experts were made part of the design team
- Reliance on training aids to learn new concepts

- Job Aid to ensure reliability on plant floor
- Project management process that integrated the multidiscipline and diverging team members

Lessons Learned
- Academic subject matter experts are influenced by their own agenda and that agenda may result in clashes
- Technology offers potential to make a product more effective and more enjoyable. At the same time, added complexities arise to increase frustration in implementation
- Technology usage during delivery will always need back-ups in place (contingencies are a must)
- Time should be built into the project for focus groups representing the total target audience mix to review interface design to truly address the usability issue – not just what the client thinks
- Document everything and communicate often

Marketplace

Dimensions of Leadership Workshop
Helping Employees Develop Leadership Skills

Collapsing organizational hierarchies and increasing workforce diversity has dramatically altered our understanding of leadership. Leadership is no longer seen as one defining role atop the business pyramid. Today, leaders come in many varieties, from charismatic visionaries to quiet team players. The **Dimensions of Leadership Workshop** from **BEI** helps you develop leaders at all levels of your organization.

During this one-day workshop, participants are given the unique opportunity to look at leadership from one of three points of view: self as leader, another person as leader, or the leadership needs of a particular situation. Participants receive a *Dimensions of Leadership Profile* (self-assessment) that provides insight into their personal leadership characteristics from four broad perspectives:

- Character
- Analysis
- Accomplishments
- Interaction

The outcome of this workshop is the implementation of shared leadership to facilitate collaboration and cooperation across the organization and increased individual leadership effectiveness.

To learn more about this workshop or the Dimensions of Leadership Profile call **BEI** at 248.625.8100.

BEI is an authorized distributor of the Dimensions of Leadership Profile published by Inscape Publishing.

Worthy Web Sites

http://www.hbsp.harvard.edu/home.html, *the Power of Ideas @ Work*. Harvard Business School Publishing offers several options to locate tools and resources for educators, entrepreneurs, trainers and managers. Select one of the aforementioned segments; browse 21 prescribed topics; or key-in your own search. Access to free email updates and resources, current excerpts of HBR articles and best sellers.

http://www.squarewheels.com/content/trainerjokes.html, new ways to engage training participants. Dr. Scott Simmerman offers a myriad of training tools such as jokes, cartoons, exercises, articles, and teambuilding ideas. Training one-liners and set-up jokes are not classified, but it is worth the time to scroll down to find some gems as: When presenting ideas to groups, I'm reminded of Groucho Marx, who once said, "Before I speak, I have something important to say."

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