

EVALUATION PHASE

PERFORMANCE-BASED TRAINING BEST PRACTICES

- Base your evaluation strategy on business metrics. Focus on measurable results and try to collect at least three levels of data.
- Design the evaluation to truly measure the performance the learning was designed to improve. Assess the training according to its effect on performance; begin using Kirkpatrick's Evaluation Level 3 (Behavior) and Level 4 (Results) strategies.
- Involve input from internal and external customers in deciding what to measure and how to measure it. This may be more valuable to achieving performance than the actual collected data.
- Teach trainees how to assess their own learning and transfer it to their daily job performance.
- Collect and report data that are valuable to your unique customer groups — employee interviews and focus group results for line managers versus production and financial data for senior executives.
- Choose the measurement method only after you decide what needs to be measured. The appropriateness of the method depends on what kind of data are needed, sources of the data, circumstances for collecting the data, and how the data will be used.
- Report your evaluation findings, so your customers can understand them and act on their implications. Keep it simple, relate it to the goals that are important to the particular audience, and recommend what should be done about the results.
- Conduct a postmortem review of an unsuccessful ISD project to find out what went wrong — to learn from your mistakes, to avoid future glitches, but most importantly, to be able to open the door to putting performance first.
- Try seeking out evidence that: 1) transfer of your training is having an impact on what's causing the performance gap; 2) improvement is being measured; and 3) stakeholders have established ownership of the training objectives.

PERFORMANCE-BASED NON-TRAINING BEST PRACTICES

- Base the non-training evaluation strategy on original business metrics to determine how well the intervention met its desired outcome. Be sure to measure against valid, objective business results (10% increase in employee retention, not an increase in employee morale).
- Document lessons learned to see if/why/how the gap was narrowed and one or more business goals that were reached. Share with everyone who will listen.
- Include quantitative and qualitative success indicators, including customers, business processes, knowledge, and growth.
- Champion performance improvement efforts/successes: 1) talk to performers, management, and the company's customers and suppliers about their views of the solutions; 2) share your results at the micro, macro, and even mega levels, especially in difficult economic times; 3) suggest that your satisfied customers endorse your services through various corporate communications channels; and 4) use your results to sell your services further or to learn valuable lessons from mistakes you may have made.
- Observe the newly-trained, average performers to determine whether they're using the new skills, knowledge, resources, or tools you supplied during the training and non-training interventions; report to key stakeholders, important decision makers, and/or managers what other obstacles are still impeding the desired performance.
- Suggest evaluating the degree to which: 1) the intervention accomplished predetermined, quantifiable results; 2) the results matched the intended effect; 3) the gap between the desired and actual performance has closed; 4) organizational needs were fulfilled; and 5) the corporate culture adopted the intervention — being sure to report both quantitative and qualitative, positive and negative effects.