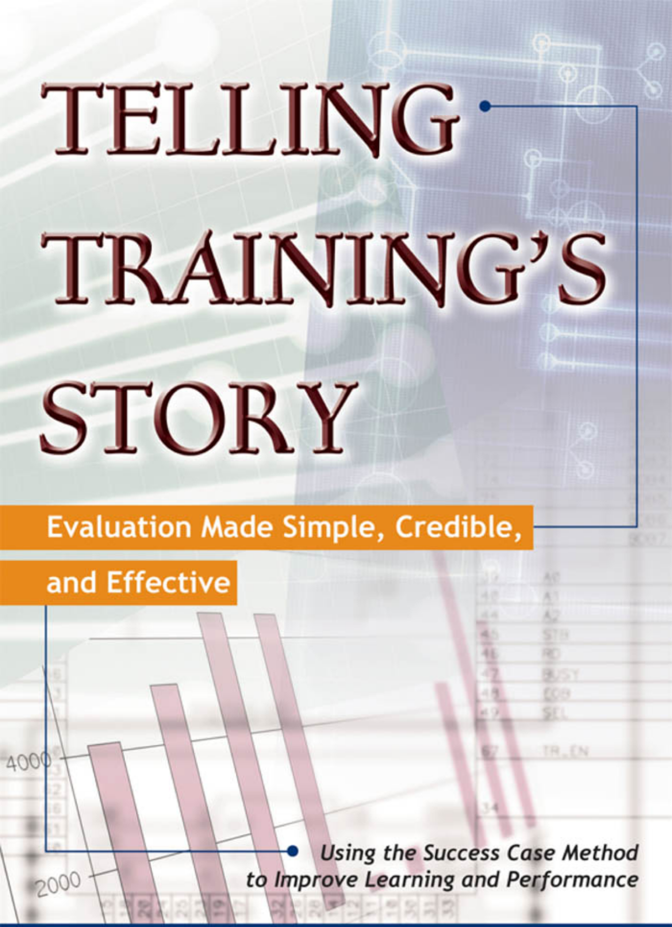
TELLING TRAINING'S STORY

Evaluation Made Simple, Credible, and Effective

Using the Success Case Method to Improve Learning and Performance



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Contents

Preface xi
Acknowledgements xvii

Part 1 1

Chapter One
Getting to the Heart of Training Impact 3
Can We "Prove" Training Impact? 6

Chapter Two
How the Success Case Method Works: Two Basic Steps 17
Training Evaluation Realities 18
The Success Case Method: Step by Step 30

Chapter Three
Success Case Method Strategy—Building Organizational Learning Capacity 35
The Determinants of Training Impact 36
Learning Alone Is Insufficient 37
Risks of the Common Training Evaluation Strategy 40
An Evaluation Strategy for Building Organizational Learning Competence 43
A Fundamental Shift in Focus 44

Redefining the Evaluation Process 47
Implementing the Strategy to Drive Change 50

Chapter Four

Focusing and Planning a Success Case Method Study

Focusing and Planning a Success Case Method Study 57
1. Clarify ing the Purpose of the SCM Study 58
2. Meet with and Discuss the Study with Key Stakeholders 60
3. Define the Program That Is to Be Studied 61
4. Define the Population of Participants to Be Studied, and Identify Any Needed Sampling Parameters 63
5. How Soon After the Training to Conduct the Survey 65
6. Establishing a Schedule for the Study 66
7. Specify and Confirm the Resources Available for the Study 67
8. Finalize the Success Case Strategy 68

Chapter Five
Constructing a Simple Training Impact Model 71
Elements of the Impact Model 73
Constructing an Impact Model 77

Chapter Six
Fishing for Success Conducting the SCM Survey 83
Defining the Survey Step 84
Conducting the SCM Survey 85

Chapter Seven
Sorting the "Catch"—Analyzing Survey Results 101
Scoring and Sorting the Survey Response 102
Choosing Interviewee Candidates 104
Analyzing Data to Estimate Nature and Scope of Impact 107

Chapter Eight
Digging Out and Telling the Stories—the SCM Interviews 111
Resolving Causal Questions 112
The SCM Interview Structure 118
Preparing for the Interviews 121

Chapter Nine
Drawing Compelling Conclusions 133
The Eight Major SCM Conclusions 133
Conclusion Type One: What, If Any, Impact Was Achieved? 136
Conclusion Type Two: How Widespread Is Success? 137
Summary of Final Conclusions 140
Conclusion Type Three: Did the Training Work Better in Some Parts of the Organization, or with Some Types of Participants, Better than Others? 141
Conclusion Type Four: Were Some Parts of the Training More Successfully Applied than Others? 143
Conclusion Type 5: What Systemic Factors Were Associated with Success and a Lack of Success? 145
Conclusion Type Six: What Is the Value of Outcomes Achieved? 148
Conclusion Type Seven: What Is the Unrealized Value of the Training? 149
Conclusion Type Eight: How Do the Benefits of the Training Compare with the Costs? 154

Part II

Chapter Ten
Sales Training at Grundfos 159
The Setting 159
Purposes of the SCM Study 160
Organizing the Study 161
Challenges and Constraints 162
The SCM Chronology 163
The Impact Model 163
Survey 166
Actions After the SCM Study 176

Chapter Eleven
Service Technician Training at the Compaq Computer Corporation 181
Other Important Factors 182
Preparing for the Evaluation 187
Evaluation Results 192
The Rest of the Story 194

Chapter Twelve
Coaching and Training at Coffee Bean and Tea Leaf® 199
The Business Scenario 200
The Training Intervention 201
The Evaluation Purpose 202
SCM Study Procedures 203
Survey Results 208
Interview Results 212
Recommendations 215
Challenges and Lessons Learned 216

Chapter Thirteen
Executive Development at Allstate Insurance 219
Evaluation Purposes 220
The Evaluation Process 221
Challenges and Constraints 227
Results 229
Conclusions 233
Recommendations 235
Lessons Learned 236

References 239
Success Case Method Assistance and Resources 241
Index 243
About the Author 251
About Berrett-Koehler Publishers 253

Preface

Most of us in the training and development profession know in our guts that what we do is valuable and worthwhile—we wouldn't have stuck with this job if we didn't believe we were doing good. The problem is that often our clients and customers are highly skeptical, and when there is pressure on resources, we usually get the short end of the budget stick. Customers and senior executives want proof, but most of us can only offer promises.

It is clear that we need to provide credible and valid evidence of training impact and show the difference training makes to the bottom line. There have been many workshops and books and articles written about evaluation of training, and many of them offer good advice and at least partially effective methods. The problem is that too many of these methods and tools are too elaborate, too complex, too costly, take too much time, or take a Ph.D. level of knowledge to understand or use.

Using the methods and tools in this book, you can discover, measure, and document the great results that training helps your organization to achieve, and report them in a way that senior leaders find compelling and believable. You will not have to rely on sophisticated and elaborate statistical methods or suspicious assumptions and extrapolations. Instead, the Success Case Method will let you tell the story of training impact and bottom-line value with evidence that would stand up in court, making a clear and inarguable case that training indeed pays off and helps your organization be more successful, durable, and competitive.

The Success Case method (SCM) is robust enough to withstand scrutiny from a scientific and research perspective but will not choke real-world practitioners and their clients with cumbersome methods and arcane statistical gyrations. On the other hand, it is simple enough for the typical practitioner to use and will not be scoffed at by chief financial officers and others wanting to see real and credible "bottom line" evidence of training impact and value.

The Success Case Method (SCM) measures and evaluates training sensibly—accurately, simply, and quickly, and above all in a way that is both extremely credible and compelling. Better yet, the results are actionable. We have learned how we can make very strategic and constructive use of our evaluation findings, actually helping clients be more effective and successful. We can justify spending resources on evaluating training because it pays off - evaluation results themselves are worth the money we spend to get them. We can make a good return-on-investment (ROI) argument for evaluation.

There is another wonderful pay off for the method explained in this book. For decades training and development professionals have recognized that manager support for training is absolutely vital to success. When managers support training and learners, it works. When they do not, it does not. As a result, we have begged and cajoled managers to support our efforts. But inevitably, despite our pleas, most managers find other things more important to do, paying lip-service only to the grand tools and guidelines we create for them. With the Success Case Method, we are able to give them a clear and data-based business case for supporting training. We can show them specific actions they can take to reinforce learning and performance, and tie these directly to bottom-line results and economic payoff to them and to their organizations. Then, rather than trying to make all sorts of mandatory prescriptions for support actions, we can simply show managers the data and let them do what they are paid to do: look at the facts and make a business decision.

The SCM does not just measure and document the impact of training, it uncovers and pinpoints the factors that make or break training success. Then it shows how these factors can be managed more effectively so that more learning turns into worthwhile performance in the future. It is aimed directly at helping leaders in an organization discover their organization's "learning disabilities" then figure out what needs to be done to overcome these problems. Over time, the SCM helps an organization become better and better at turning an ounce of training investment into a pound of impactive performance.

The SCM approach for evaluation can be used for more good things than just pleading the case for your existence. Not that making the argument for your budget is a bad thing to do. It is certainly a good thing to be able to show your customers and bosses that what you do pays off, and that their investment of dollars in your function is worthwhile. You need this information, and they do too. But if this were all that you could do with training evaluation results you would soon, and rightfully so, encounter resistance. Diverting resources from your central mission in order to defend your budgets and pat yourself on the back for a job well done is not a good enough reason to spend more of your organization's precious resources, even if the evaluation process you use, like the Success Case Method, is relatively inexpensive.

My colleagues and I had been nibbling around the edges of this approach—the Success Case Method—for a long time. It just took us a while to figure out how to make it as strong and yet as easy to do in evaluating training programs as it has become today. It also took a lot of work with many clients and colleagues who put it to use and began to get great results with it. Companies such as Hewlett Packard, Delta Airlines, Ingersoll Rand, Daimler Chrysler, Pfizer, and Pitney Bowes (among dozens of others) have used this method and helped make it robust and practical.

I have been working at and writing about measuring training for more than 30 years. I am by profession and reputation a "world renowned" expert in evaluation and measurement. I completed a doctoral degree in program evaluation and learned a raft of sophisticated methods and techniques for partialing out causes of things, making complex statistical analyses, and conducting all sorts of tests and measurements. Yet only in the recent past ten years or so have I finally figured out how to do this evaluation work sensibly and simply. While it may have taken a long time to get here, I am proud to write this book, and prouder still of the evaluation method and tools described in these pages.

Each year, companies and organizations across the globe spend billions and billions of dollars providing training and education to their employees. The good news is that by and large this investment is worthwhile and pays off. The bad news is that it does not pay off anywhere near as much as it could and should. Worse yet, the effects of training, even when it is very successful, have been perennially hard to measure and prove. When it comes to being able to show whether a single training program is making a worthwhile difference or not, most training and development professionals are at a loss for a good answer.

In the first chapter of the book, I explain the simple and basic concept of the Success Case Method (SCM) for evaluating training, showing how we solve the riddle of measuring training impact in a way that makes it clear, specific, and believable. The second chapter presents the strategic framework for the SCM. This shows how the SCM pays for itself by creating results that an organization can use to improve management capability and performance. How the SCM works and the five steps in planning and implementing a SCM evaluation form the content of the third chapter. Chapter Four through Chapter Eight are each dedicated to in-depth instructions and guidelines for carrying out each of the five SCM steps. The closing four chapters present, one chapter per example, case study summaries of actual SCM evaluations carried out in major global organizations. These are authored by previous SCM clients and professional colleagues who are dedicated SCM practitioners.

Liberal examples, illustrations, tools, checklists and guidelines are included throughout the book. In short, the book not only tells you about the Success Case Method for evaluating training, it shows you step by step how to do your own SCM projects and how to help you and your organization benefit from them.

Part I

Chapter One

Getting to the Heart of Training Impact

Jan Westbourne had a lot going for her—she was attractive, energetic, bright, and an MBA from the University of Massachusetts. To top it off, she drove an old 60's Porsche Speedster during the Maine summers, switching to a newer SUV for the long winter. Just two years out of her graduate program, she worked in the thriving American Express Financial Advisors office in Portland. All in all, life should have been pretty good for Jan.

But things were not going well. Jan was ranked at the bottom of the 32 fellow advisors in her office. Here she sat in last place, with low performance metrics and a productivity record that put her in the bottom ranks of advisors nationally with her tenure in the company.

It was not for lack of trying. Like others in the office, Jan made telephone "cold calls," trying to land initial appointments from the long list of prospects the office head provided. But she struggled. The lengthy list of names in front of her would swim in her vision and seem to grow interminably longer in front of her eyes. She would hear echoing voices even before the call of the rejection she was certain she would get. Sometimes, her confidence would flag so much that *she could make only one or two calls. As soon as she got a particularly nasty negative response, she'd pack up and head home, choking back the hot tears that threatened to overtake her if anyone spoke to her.*

Her failure nagged at her. This was not how she saw herself—a dean's list graduate and, in her own estimation, a financial analysis whiz. Her friends in school noted and envied her air of self confidence. If they could see her now they would change their tunes. She was fine in client meetings, and in fact could close a sale almost as well as the best in her office. Her problem was making the calls and screwing up the courage to listen to all the "Thanks, but no thanks" replies that were inevitable. Growing up, Jan had not been a person who was used to hearing, "no."

With so few appointments, she made virtually no sales. Her company data base sales-closing rate predicted one sale for every ten appointments, a number of appointments that many of her fellow advisors reached in a few days. She was lucky to have ten appointments in two months!

She was on the verge of quitting, and in fact, when her boss asked her to stop by the office for a "chat" she decided the option of quitting would be a moot point, as she was certain she was going to be terminated. Not without reason, either, she reminded herself.

But the visit was something else—an invitation to participate in the new advisor "EmoComp" sessions—training in emotional intelligence for new financial advisors. Surprised and again fighting back tears as they reviewed her miserable performance, she listened to her boss's pitch for the training and decided, why not? She would at least sit in, as it was better than getting beaten up on the phone every day and going home crying. Given that she was an apparent flop at this job, at least she could put the training on her resume.

This was Jan's state of mind at the time, she recalled, as she told me her story. What a difference today, ten months after that fateful visit to the boss's office. Her eyes sparkled as we talked, not now with tears but with the energy of her renewed faith in herself. At the time of our meeting, she had moved up *ten places in her productivity ranking and was pushing hard against top ten overall. Her assets under management (a key performance metric) had swelled dramatically, an enviable record for anyone with her short tenure.*

The training had been fantastic. She related how she mastered the techniques taught for mentally reframing "failure" reactions into simply non-personal and unthreatening information. She talked of her practice sessions, the feedback she got from her boss, and of the hours she spent reflecting on her emotions when she encountered similar rejections.

Over the weeks after the training, her appointment rate crept up; first 2 to 3 a week, then 5 to 6, then to her current average of more than 14 per week. In the first week after the training, she spent 16 hours making cold calls, almost 8 times what she had ever done before. Though she did not confirm a single appointment that week, she made it through all 16 hours of calling without breaking down and quitting. Using the techniques from the training that she eventually mastered, she persevered despite rejection. She managed her emotions and overcame her fears, making call after call after call until she scored her target level of "wins," and left to celebrate her success.

After our meeting, both of us feeling good, and with the sun bouncing off the Casco Bay waves, we rode to lunch in her venerable Porsche.

• • •

This was the story my evaluation efforts got for me about Jan. There was no doubt in her mind that this training had been successful, and there was little doubt in mine as well. I have always believed in the power of training. Despite my many struggles with evaluation methodologies and issues, I left the interaction with Jan absolutely convinced that, in her case, the emotional intelligence training her company provided had paid off, and paid off well.

Later, after getting the corroborating evidence and documentation I needed to verify her story, I reflected on the questions that nag so many in our field of training and development. Does training really make a difference? Can we "prove" impact? How can we make the business case for our investments in learning? What evidence can we collect that training really works?

Can We "Prove" Training Impact?

Jan's story is true, though her name and specific office location are fictitious. This was just one of several such stories my colleagues and I gathered during an evaluation of American Express Financial Advisors landmark training programs in emotional intelligence. Later in the book (Chapter Two) I will explain how collecting and verifying stories such as these fit into the Success Case Method evaluation process. In a moment, we will reflect on Jan's story and consider how it makes the case for training impact. But first it is useful to review the larger issue of training impact and how we have tried, in the past, to measure and evaluate it.

Training is one piece, and a small piece at that, in the larger puzzle of individual and organizational performance. The difficulties training professionals and their clients and critics have always had with measuring training benefits are that so many other factors are involved. A training program for sales representatives might indeed increase sales skills, but how much does it really contribute to increased sales and market share? If we measure sales records before and after training, we might or might not find any differences even if the training were having an effect. Or, we might find an increase in sales even if the training had not been any good. Market conditions, new competition, product characteristics, sales incentives, swings in the economy, and seasonal consumer demands are just a few of the factors besides the training that could easily influence bottom-line results. Given that so many other factors interact with the performance outcomes that training is aimed at, it becomes nearly impossible to sort out the effect that training did, or did not have.

This fundamental reality—that training is only one of many contributors to the goals that we seek to achieve from training—has been the major stumbling block for training evaluation. It has always been seen as relatively easy to measure the success of training when we look narrowly at whether people enjoyed it or believed it was a valuable experience. But so-called "smile sheets" do little to convince anyone that training is really worthwhile, since the enjoyment of training may have little or nothing to do with its ultimate success. It has also been relatively easy to test for learning outcomes, and say with confidence that people either did, or did not, increase their skill or knowledge as a result of a learning experience. But, did it really get used, and did using it lead to any worthwhile outcomes, and did the whole program make any lasting difference to important organizational outcomes such as revenues, competitive advantage, or profits? This has been the perennial impediment.

The training literature is full of evaluation methods and models that have sought to deal with the difficulties in measuring organizational training benefits and attributing these to the training intervention.

Experimental methods with randomized, double-blind treatment and control groups are considered the "gold standard" when it comes to determining the effects of interventions and making causal claims. But these are far too impractical and costly for use in the typical organizational setting.

- Quasi-experimental approaches, such as utility analysis (see Schmidt, et al, 1982, and also Cascio, 1989) or time-series designs (see, for example, Trochim, 1986). These methods are very complex, require sophisticated research and measurement skills, and their statistical manipulations and reports are difficult to comprehend.

- Simpler methods such as the return-on-investment (ROI) methods made popular by Jack Phillips (Phillips, 2003). But even the ROI models and methods can be time consuming and expensive. More importantly, they leave many questions unanswered and involve statistical calculations and extrapolations that raise serious doubts among report audiences.

Overall, when it comes to "proving" that a large training intervention made a worthwhile difference to a company or agency, there are many methodological stumbling blocks and practical realities that can be overwhelming. It is no wonder that most learning and development practitioners have pretty much thrown in the towel and sought to avoid the issue, or sought to deflect attacks by critics with occasional impact and ROI studies. My colleagues and I were no different from thousands of other training professionals; we also struggled with these difficulties, but for us the issues were even more poignant, as we were seeking to be experts in the training evaluation field and also to make a living actually doing evaluations of training.

When we pose the training evaluation question as trying to measure the impact of a large training program for hundreds of employees on the ultimate goals of an entire organization, then the problem indeed seems complex beyond practicality and overwhelmingly difficult. But, what if we step back for a moment, and ask a simpler question? Take the limited instance of whether training made a difference for one single person. What would we want to know, and how and where might we look for answers? These were the questions we asked ourselves when we were in the process of inventing the Success Case Method (SCM), and we surprised even ourselves with the relative ease of solving this problem.

Immediately, by posing the problem as making a case for training impact from one individual trainee, we relieved ourselves of all sorts of statistical significance and extrapolation burdens and obstacles imposed by having to make generalizations to multitudes of trainees. To simplify things further, the standard for evidence and validity we set for ourselves was derived from the jurisprudence model, not the realm of experimental methods and reductionist analytic techniques such as calculation of means and standards deviations. We wanted evidence that would convince a normal working professional with no research expertise—making the case beyond a reasonable doubt—that training did, or did not, work successfully.

Demonstrating Impact, One Trainee at a Time

Assuming that one single person was the focus of our inquiry, we thought we would really only need to have answers to three pretty simple and fundamental questions to make the case for a training success:

1. What, if anything, did this person learn that was new?
2. How, if at all, did this person use the new learning in some sort of job-specific behavior?
3. Did the usage of the learning help to produce any sort of worthwhile outcome?

If we got positive answers to these questions that we could really believe, would we not have a credible and defensible answer to the impact question? That is, what if we could demonstrate—with convincing evidence—that a person really did learn something new, that they really did use this learning in some important job application, and that this job application led to a worthwhile outcome; would we not have a credible and defensible instance of impact from training? We certainly believed so, and this belief became the foundation for the Success Case Method (Brinkerhoff, 2003). If we could not come up with a credible approach to making the case that training had a true impact for one person, we certainly would make no further progress in crafting a training evaluation method that could work at the program and organization level.

Now of course there may be skeptics who would question the veracity of the one-person impact instance, and no doubt you the reader have already begun to ask question yourself. To resolve the very reasonable doubts that anyone would have, we must take our answers to the three questions beyond simple "hearsay" and confirm them with evidence. We'll also have to eliminate some alternative explanations, even if we do find some successful post-training performance improvement. What if, for example, a person did good things after training but didn't really use anything they learned in the training to do so? To explore these doubts, we will return to the story of Jan, our financial advisor, and consider what additional questions we would have to resolve to accept her story as a true and valid instance of training impact.

Table 1-1 captures these doubts and concerns in a systematic fashion and arranges them by the three basic questions that we used to focus our inquiry. For purposes of further discussing how believable the impact claims can be, the three basic questions have been changed from question form to positive statements, and personalized to Jan's story.

Table 1-1 Looking for Alternative Explanations

Basic Impact Claim	*Alternative Explanation Questions to Be Resolved*
1. Jan learned some new skills for coping with emotional reactions that were hindering her success in making cold calls.	Was emotional interference really the cause of Jan's inability to make more cold calls? Were the skills truly new or had she already mastered them? Were the skills learned in the training or did she get them from somewhere else?
2. Jan's usage of her EmoComp skills helped her persevere and make more cold calls.	Did Jan in fact make more cold calls? Did Jan use the learned skills or did she really use some other skills that did not come from her training? Did the use of the skills really make the difference in making more cold calls, or did something else—perhaps a job aid or an incentive—cause her to change her behavior?

(Continued)

Table 1-1 Looking for Alternative Explanations (Continued)

Basic Impact Claim	*Alternative Explanation Questions to Be Resolved*
	Could she have made more calls without the training, for instance if her boss had just told her to do it "or else"?
3. Jan's making more calls led directly to her making more appointments, which in turn led to her increase in sales.	Did Jan's sales performance really increase? Were the calls necessary to her getting more appointments? Did something else change that helped her get more appointments, such as better prospects on her call lists? Were more appointments necessary to her making more sales? Did she do anything else new that helped her get more sales?

Any skeptics worth their salt would certainly want answers to these questions before they would be ready to agree that Jan's story represents a training success. Thus, we knew that if we were going to take her story before senior executives at American Express and stand behind it, we would need to get good answers to these questions. And this is exactly what we do in a Success Case study, as we'll see in later chapters (especially Chapter Eight on interviewing and Chapter Nine on conclusions to be drawn from SCM studies.)

Using the SCM, we systematically raise and test the answers to each of the questions in Table 1-1. We do this by asking questions directly to Jan, and if we need corroborating evidence we ask other people, such as Jan's boss or a peer. We also look for evidence that would substantiate claims of impact learning, performance, and outcomes in documents and records. In addition, we test alternative explanations, such as whether a change in office procedures or market conditions may lead to equally significant performance improvement.

If we find that Jan really learned and used something from the training, and we could not find evidence that any alternative explanation from Table 1.1 was valid, we have to conclude that this training probably did work. Jan really was performing more effectively, she took the training, she learned something useful in it, she used it on the job, and the training was a major contributor to her success. If the training were not a success, the only alternative explanation could be that Jan was sorely and deeply deluded, and further, we would have to believe that some sort of conspiracy was in place to alter office records and arrange for co-workers and her boss to give us blatantly false information. Because none of these explanations is plausible, we must come to the conclusion that the training was successful, at least in Jan's case.

But wait. Jan's training was not the only thing that helped her performance improve. Certainly we are not ready to make the claim that her training, and her training alone, was the sole cause for her improved performance, are we? After all, you read in her story how her manager encouraged her to participate in the training, and how she practiced her skills after the training, and how her boss gave her feedback on her efforts. Surely these played a role. Indeed, they did and do, and we must take them into account as well.

Accounting for Other Success Factors

One of the things we have learned in decades conducting evaluation studies and reviewing the research and theoretical literature on learning and performance is this: training alone is never the sole factor in bringing about improved performance, and is often not even the major contributor. Given this, we never try to make an impact claim for training alone. Nor do we try, as some popular evaluation methods and models do, to estimate, isolate, or tease out the difference that training alone might have contributed. There are strong reasons for this, both methodological and strategic, that will be made very clear in the Chapter Three.

We already know without any inquiry at all that training alone was not a sufficient cause. Certainly, there were other factors that played into Jan's success, not the least of which were her boss's support and coaching, and the follow-up materials she could and did access. But, as she so convincingly claimed, this training was a necessary and vital catalyst. It came at just the right time and saved her professional life. She was an asset now to her family, to her office, and to her customers. There is no way, no way at all, that this would have happened but for that training.

We will not try to make a claim about the percentage of impact that was contributed by Jan's training. Again, in Chapter Three we'll explain why there are sound methodological and strategic reasons for not making such estimates. Instead, we just want to be sure, beyond a reasonable doubt, that had Jan not participated in and learned from her training, it is highly unlikely that her improved performance and the benefits that accrued from it would have happened. In other words, we are very content with being able to show that training made a difference, and an important difference, and that the training contributed to valuable outcomes.

In fact, the Success Case Method has the additional goal of pinpointing exactly what additional factors played a role in the success of the training, such as a manager's commitment or a new incentive. Training is always dependent upon the interaction of these other performance system factors in the improvement of performance. If we can find out not only that training made a worthy and necessary contribution, but also what other factors played the biggest role in its success, then we can not only "prove" training, but we can take some very effective actions to improve it. If, for example, we know that success such as Jan's cannot be accomplished without several sequential instances of some feedback from a boss or co-worker, then we can make sure in future iterations of that training that such factors get put in place. We can educate the people who control these factors to manage them so they can get the greatest performance return for their training investments. We take this argument further in the third chapter where we look closely at a strategy for evaluation and show how the Success Case Method can be leveraged for management and organization development.

From Individual to Program Impact

Obviously, the Success Case Method does not look for only one training success out of a whole program. But the principles we employ in making the case that training worked for a whole program are exactly those that are involved in making the case for impact with one individual. If we could do this well, then next we would tackle the issue of assessing multiple individuals and looking for broader indicators of impact. Certainly a basic corollary is true: if we thoroughly searched and could not find a single real success, then we could make a decisive judgment about the failure of the entire program.

There is another key reason for beginning with a discussion of making the case for the impact on an individual. All training impact begins with the individual. Consider the case of the EmoComp training at American Express, consider further (as was actually the case) that many hundreds of employees were enrolled in this program. Now consider that of these hundreds some went on to use their training in job performance much as Jan did, and some did not. The amount of organizational impact that this training program helps produce is a direct function of the number of individuals who end up using their learning in ways that make a contribution. The more people who are like Jan Westbourne, who find an impediment in their performance that is deriving from some emotional issue, and then take steps to resolve it using a tool from the training, then the more impact this training will have. Clearly, if no one uses his or her learning, then there will be no impact. If 50 use it as well as Jan did, then there is more impact than if only three do.

Organizational impact of training boils down to two rather simple dimensions: the numbers of people who use their learning, and the power of the ways that they use it. One person who uses learning in a very powerful job application that leads to huge results will produce more impact than ten people who use their learning in pallid and ineffectual ways. Likewise, 50 people using their learning in very powerful ways will produce more impact than one person using that training in an equally powerful way.

Given these rather simple constructs, we can decide how to evaluate the training. If we want to find out how much good a training program did, there are two things we have to know:

- How many individuals used their learning in ways that led to worthwhile outcomes?
- What is the value of the outcomes that these individuals helped achieve through using their learning?

The good news is that this is not an overwhelmingly complex task. When it comes to making a case for training impact in the case of only one person, as we have seen, the burden of proof is not terribly difficult to assemble. There is further good news in that, because of certain predictable distributions of training results, we don't have to track down every single individual who participated in the training and analyze their experience. If this were the case, we would still be evaluating the American Express training even though we started it over seven years ago, as many thousands of employees participated. Given that training has a predictable range of effects and that sampling methods allow convincing generalizations, and also that we have developed some highly effective ways of getting at the right samples, the Success Case Method ranks as not only one of the most convincing means for evaluating impact of training, but one of the most simple and practical.

In the next chapter we will explain in more detail exactly how the Success Case Method works, building the case for training impact (or lack of it), one individual at a time.

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