The Field Guide to the 6Ds

How to Use the Six Disciplines to Transform Learning into Business Results

TIPS, TOOLS, CASE STUDIES, AND PRACTICAL ADVICE

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Case D6.1

How We Guide Our Clients to Design with the End in Mind

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Background

KnowledgeAdvisors is a leading learning and talent analytics company that enables organizations to better allocate human capital investments through practical learning measurement guidance and strategies. Their analytics system, Metrics That Matter®, helps organizations measure and improve their talent development programs, driving improved productivity, reduced administrative costs, and increased return on learning investments through data-driven decision making.

KnowledgeAdvisors' clients represent many of the world's leading organizations, including four of the five largest accounting firms, three of the last five winners of Training's Top 125 Award, the world's largest company, and the prestigious U.S. Defense Department University.

All organizations need scalable and repeatable processes for measuring their programs. Strategic and costly programs require special

treatment though. These highly visible programs are under greater scrutiny, not only to ensure a high-quality learning experience, but equally importantly, to ensure that they make a difference, that is, impact a business outcome. The challenge for many of our clients is that they don't sufficiently clarify the success indicators during the D1 (Define) stage or the chain of influences among a set of inputs (e.g., resources to design, develop, and deliver a solution), the outputs (e.g., people trained), the short-term impact (improved job performance), and finally, to the ultimate goal of improving customer satisfaction, market share, or profitability.

I have two goals as a consultant guiding clients through the process of designing with the end in mind:

1. To make explicit the linkage between program inputs (resources, funding, and technology), program activities (assessments, training, collateral, coaching), outputs, short-term results, and ultimate outcomes.
2. To demonstrate the importance of systematically embedding this up-front activity into an end-to-end training solution development lifecycle.

What We Did

To make a stronger connection between the program and ultimate outcomes, I leverage a standard methodology used in program evaluation. This methodology is not specific to training, but rather employs a process to make the link between a change initiative and its ultimate impact. The process itself is straightforward and is known as logic modeling.

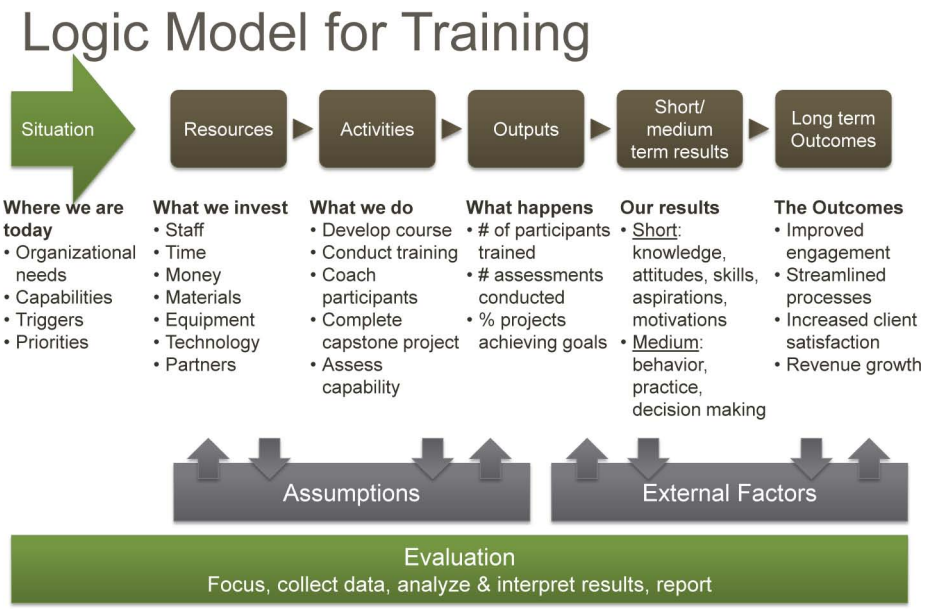
Simply put, a logic model is a logical chain that depicts program connections and the expected accomplishments of the program. The logic model consists of a series of "if-then" relationships that, when

implemented as intended, lead to the desired outcomes. The logic model identifies the resources that are invested in the program, the activities that are undertaken, the direct outputs (or deliverables of the program), the short-term and medium-term results (e.g., new knowledge, skills, or behaviors), and finally, the business outcomes (see Exhibit D6.1.1 below).

With logic modeling as a foundational process, I add three components to the front end:

- Identify the stakeholders and what they believe to be credible evidence of impact.
- Describe the solution and all the components that contribute to the outcome.
- Document other contributors or inhibitors to success (for example, performance incentives, other skills training, organizational changes, and so forth).

Exhibit D6.1.1. Logic Model for Training



Together with the logic model, this process not only characterizes what the program is intended to do, but ensures that stakeholders will believe the results when they are ultimately presented.
I start by establishing the basic hypotheses of the training:

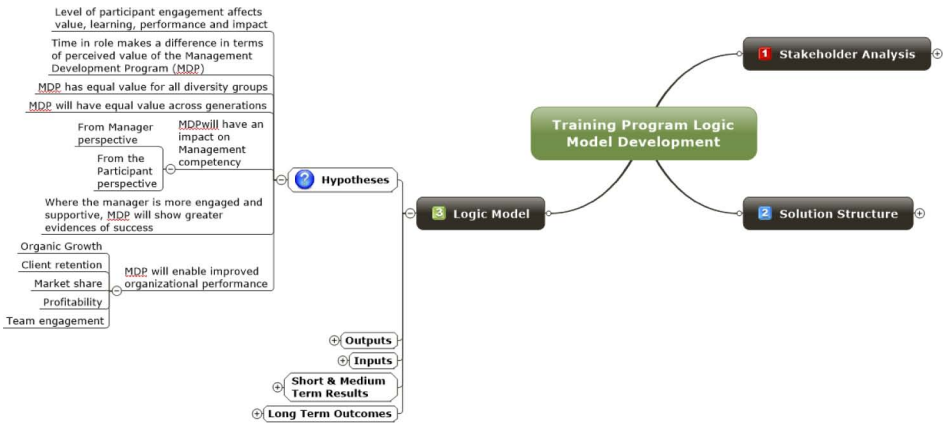
- Why are you doing this?
- What do you expect to happen as a result of the training?

This discovery process is best handled through the use of mind mapping where the client can brainstorm the expected results and outcomes. When a client has not distinguished between short-term result (e.g., increased knowledge), a medium-term result (demonstrated competency), and visible impact (improved client retention), the brainstorming process helps sort out how the pieces of the program fit together. An example of a branch of the mind map for a hypothetical management development program is depicted in Exhibit D6.1.2.

After completing the mind map, I then guide the client through a process of identifying the key measures for each link in the chain of influences:

- If the program is scheduled to train fifty new managers in the next six months, when will these attendees complete all components of the program?

Exhibit D6.1.2. Mind Map for a Management Development Program



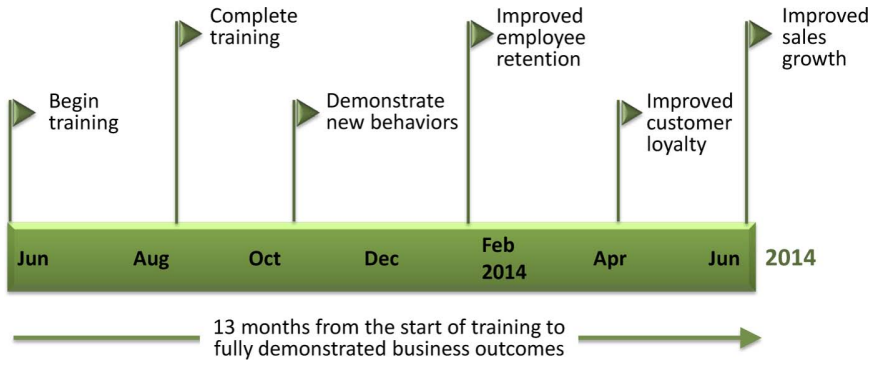
- How long will it take for their managers to see new behaviors in coaching, planning, and executing on the job?
- And finally, how long will it take to see an impact on employee retention, increased customer loyalty, and year-over-year sales?

This discussion results in a more meaningful answer to the question: "What does success look like?" and, equally important, it answers the question: "When will we see it?" This portion of the discussion is critical because it often triggers the realization that:

- D2: Designing the complete experience may require pre-work or pre-assessment to ensure participant readiness to engage.
- D4: Driving learning transfer will require more visible management support and perhaps a formal coaching program to help participants overcome barriers and create accountability for application.
- D5: Deploying performance support will necessitate tools and perhaps a social network to enable participants to learn from each other.

In our hypothetical example of the management development program, the sponsor realizes that the elapsed time between the start of the training and evidence of all business outcomes is thirteen months (Exhibit D6.1.3). At this point, she has a clearer picture of other critical activities required to ensure full learning transfer.

Exhibit D6.1.3. Time Line from Training to Results



Cautions Logic modeling has the greatest impact when used in the early stages of solution design. Unfortunately, as a consultant, I often find myself employing the process after the fact, in some cases months if not years after the program was initially deployed. So logic modeling becomes a reverse engineering effort that can have multiple benefits but also a few risks.

The single biggest risk is that the logic model surfaces gaps in the design. With one client, I asked the team to describe the desired behaviors from the program and how these aligned with the expected behaviors for the role. "You mean, like a competency model?" the client asked. The discussion resulted in them pausing program development to align program outcomes with the competency model for the role.

With another client, the logic model highlighted that the program would not contribute to the anticipated business benefits. The program was intended to build leadership bench strength. However, it was predominantly knowledge- versus skills-based. So while the program would increase awareness of new behaviors and some new skills, it would be unlikely to materially contribute to the quality of the leadership bench.

Surfacing gaps in a program design, particularly for a long-running program, can undermine the credibility of the program lead and cause leadership to question the value of the investment. So my advice is to set expectations about this process in advance and help the program lead to position logic modeling as a process enhancement and a long term benefit for L & D.

Results

All my clients exposed to logic modeling experience an aha moment. They realize that they lack a well-defined "chain of influences" between

the training and the business benefit. The missing links will make it difficult for them to conduct a meaningful impact analysis or credibly demonstrate the contribution of the program to business outcomes.

The most powerful result that my clients have experienced is the opportunity to build different relationships with their business partners. Discussions with key business stakeholders not only create mutual accountability for results but help focus the solution. Clarity on what is to be achieved and agreement on specific outcomes has enabled clients to produce higher-quality solutions more efficiently and effectively.

This understanding of the power of logic modeling has led several of my clients to commit to embed the logic model framework into their initial discussions with their sponsors. My clients who have embraced performance consulting have integrated this additional step into the business needs analysis as well as the client contracting process. Several are beginning to set specific performance goals for the program. They realize that it's not enough to indicate that sales will increase from the management development program, but specifically that it will contribute 5 percentage points to the planned 20 percent increase in sales in the next fiscal year.

Simply put, logic modeling provides more rigor to the front-end discussions and changes the conversation with the business, not just after the fact, but through the entire training solution development lifecycle. This structured and repeatable process has enabled clients to design higher quality programs that deliver the expected outcomes and demonstrate the value of L & D to the business. For L & D practitioners wanting to have a seat at the table, this process gets them a lot closer.

Advice to Colleagues

While logic modeling is not a new process, few L & D functions have embraced it. As with any change, I suggest you start small and then grow. Also, while you can use logic modeling for any program, it is most useful for strategic, costly, or visible programs.

To start, I recommend the following:

- Learn the process. There is a lot of free material on the web and dozens of high-quality books on the topic.
- Practice the process with one key program, even if it's after the fact. Involve a small group of colleagues and stakeholders who have been engaged in the program design, development, and/or deployment of the program.
- Identify where you can embed this process into your end-to-end solution design process. Pilot it in specific areas, for example, leadership development or sales skill programs.
- Identify early adopters who can execute this process and have the skills and confidence to engage the sponsors in business-oriented discussions.
- Communicate successes achieved by using a new approach. Build support for logic modeling across L & D.
- Learn, expand, and evolve. The more widespread the use of the process, the more impact it will have on changing the conversation with the business.