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A Primer for the Measurement of Corporate Training: *The Bersin & Associates Impact Measurement Framework*®

About the Author



Josh Bersin,
Principal Analyst

Introduction

Corporate training is a notoriously difficult thing to measure. While most organizations understand the vital need for ongoing employee development at all levels, training professionals still need ways to develop actionable, pragmatic measurements of activity, utilization, efficiency and impact. Such measurement is important for many reasons, such as:

- Validating financial investments;
- Helping trainers in optimizing their programs; and,
- Helping executives understand the value of the training programs they support.

Our research over the years has clearly shown that, while the Kirkpatrick four-level Model¹ is easy to understand², it does not provide the training manager with a complete solution. It is more of a “thought model” than a real “implementation model.”

BERSIN & ASSOCIATES, LLC
6114 LA SALLE AVENUE
SUITE 417
OAKLAND, CA 94611
(510) 654-8500
INFO@BERSIN.COM
WWW.BERSIN.COM

¹ Donald Kirkpatrick’s four-level Measurement Model has been widely published in many articles and its terminology is well-known to most training professionals. The original model was published in *Training and Development Handbook*, R. L. Craig, McGraw-Hill, 1976.

² Level 1 – Learner satisfaction or reaction; Level 2 – Learning based on objectives; Level 3 – Job impact; Level 4 – Business impact.



KEY POINT

Bersin & Associates developed a modern measurement framework that helps organizations see the problem of training measurement in a broader concept.

After interviewing several hundred training professionals and conducting three broad industry surveys (in 2004, 2006 and 2008), we developed a modern measurement framework that helps organizations see the problem of training measurement in a broader concept. This Bersin & Associates Impact Measurement Framework® is shown in Figure 1. This Model is describe in detail in *The Training Measurement Book*®³ (available from Amazon.com or Bersin & Associates), as well in our comprehensive research on training measurement, *High-Impact Learning Measurement*®⁴.

The Bersin & Associates Learning Impact Measurement Framework®

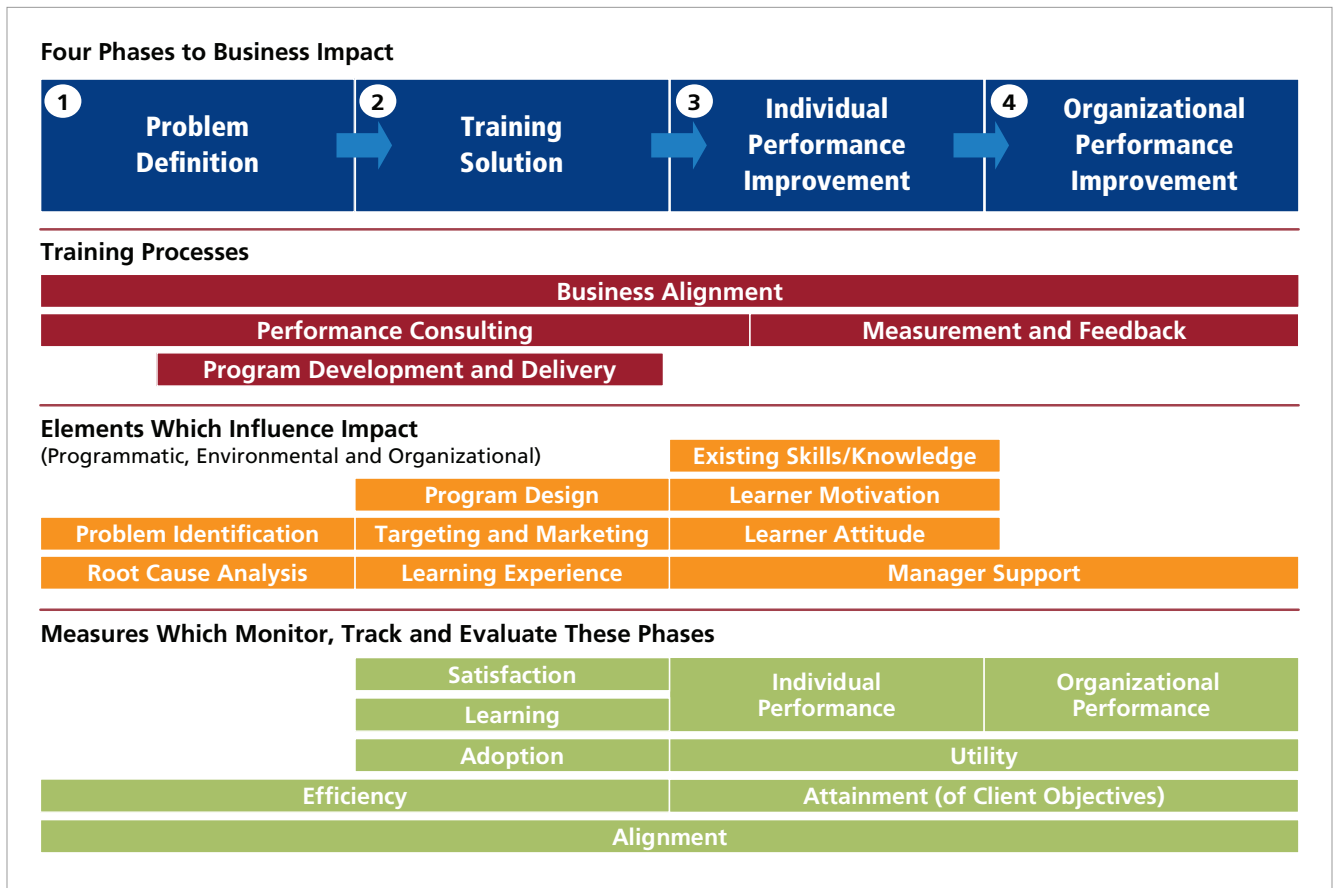
The Bersin & Associates Measurement Framework is built on a model – a systematic end-to-end description of how corporate training adds value. As shown in Figure 1, all training programs have four major phases:

1. Identify a problem;
2. Develop a training solution;
3. Improve individual performance; and then,
4. Improve organizational performance.

³ For more information, *The Training Measurement Book: Best Practices, Proven Methodologies, and Practical Approaches*, Josh Bersin / Pfeiffer, 2008. Available at www.bersin.com.

⁴ For more information, *High-Impact Learning Measurement: Best Practices, Models, and Business-Driven Solutions for the Measurement and Evaluation of Corporate Training*, Bersin & Associates / Josh Bersin, November 2006. Available to research members at www.bersin.com/library or for purchase at www.bersin.com/measurement.

Figure 1: The Bersin & Associates Impact Measurement Framework®



Source: Bersin & Associates, 2006.

These simple four steps give us a guidebook for what to measure.

- 1. Problem Definition** – In the area of problem definition, we must consider how we measure business alignment, performance consulting⁵, root cause analysis and the needs capturing process. If we develop a fantastic training program that focuses on the “wrong problem,” no measures of satisfaction or learning will be relevant.

⁵ “Performance consulting” is a needs assessment process that must be completed to identify the root cause of the business problem. Working with the line of business, performance consultants diagnose the business problem and assess the needs, and then work with instructional designers to develop, launch, manage and assess the training solution. Performance consulting does not presume that the solution is training.



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2. **Development and Delivery of Training Solution** – In the area of training development and delivery, we must measure our ability to efficiently and effectively:
 - a. Design and develop training programs;
 - b. Target the right audience;
 - c. Roll out the program; and,
 - d. Deliver an interesting and relevant learning experience.

In this phase, we want to look at learner satisfaction, amount of learning and adoption⁶ – did they really attend and complete the program. We also want to look at the efficiency of our training development processes, along with how well we stay aligned with the business during the design, development and delivery stages.

3. **Individual Performance Improvement** – In this phase, we want to measure how well the individuals being trained actually improved their performance (based on the needs analysis conducted in phase 1). If the problem we identified was machine errors, did the error rate decrease? We also want to look at the learners':
 - a. Existing skills (e.g., maybe some learners were already very good at avoiding errors and others were not);
 - b. Motivation (e.g., some class attendees are there for the doughnuts, others are there to really reduce their error rates); and,
 - c. Attitudes (e.g., do the learners actually want to learn or do we need to coerce them?).

Most importantly, we must look at the role of the manager – no training program has impact if the managers do not reinforce its use for many months after the program is completed. While a learner may score a course high in satisfaction, if the manager scores it low or does not reinforce the materials, the course is likely to be a waste of time and money.

⁶ "Adoption" measures indicate how well the program was targeted and marketed, and how well the audience actually received it.



KEY POINT

According to Bersin & Associates research, most companies start with the basics of measurement and build sophistication over time.

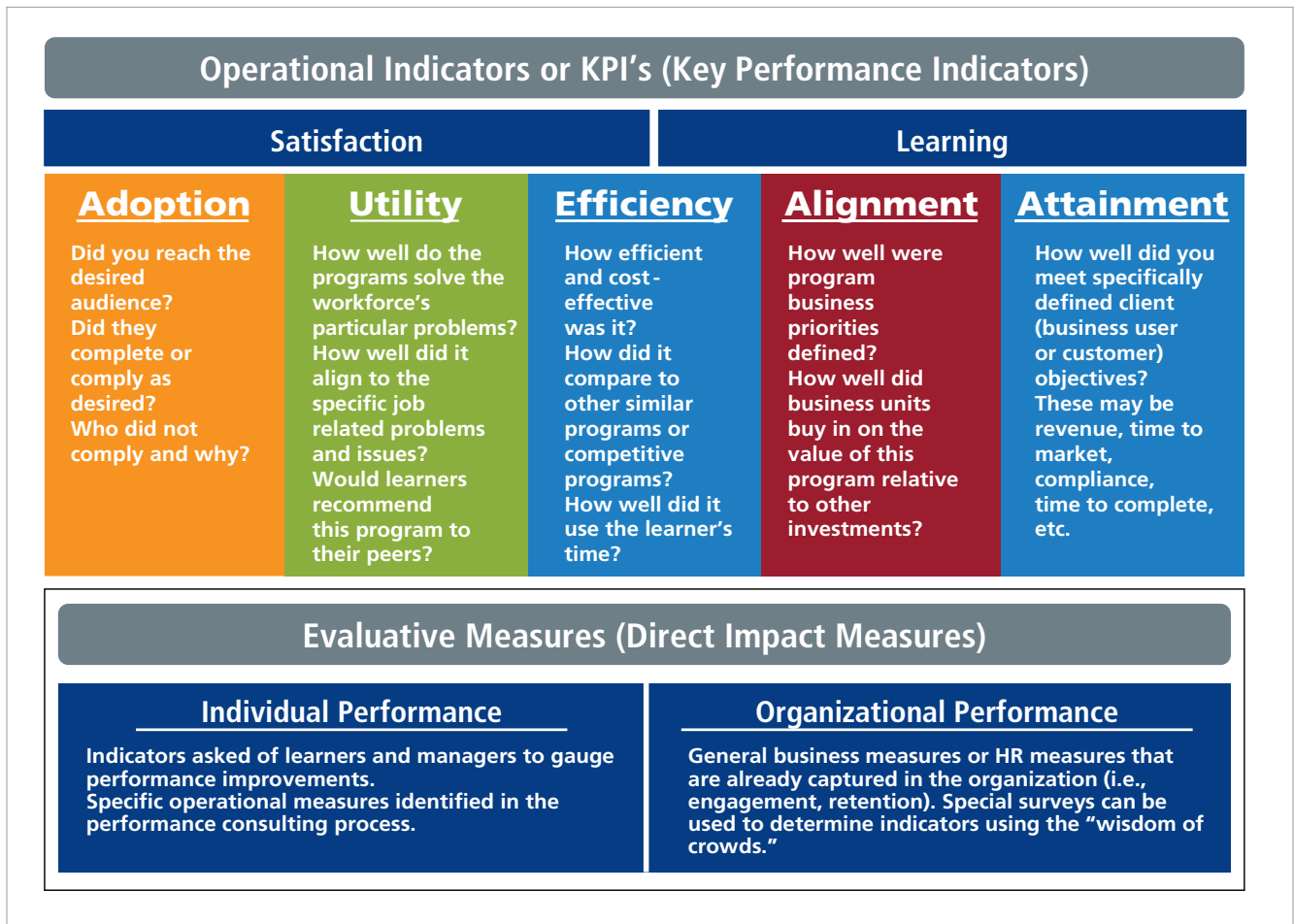
4. Organizational Performance Improvement – Finally, we must consider how the improvement in learner results impacts the business. If these individuals actually reduce their error rates, do we get the resulting improvement in manufacturing quality that we set out to achieve? Can we somehow make sure that the information gained from this course is shared among others, and now reinforced and improved over time? Training a few “people” may help for a while, but can we find ways to transfer this learning back into the organization, so that it improves itself over the long term?

In the context of these four phases, there are clearly many things we could measure. We find most companies start with the basics and build sophistication over time (*often over several years*). This Framework itself gives you a guide to this journey and helps you prioritize what measures you would like to establish first.

The Impact Measurement Framework® – Nine Areas

The Framework (Figure 2) illustrates the nine measurement areas that comprise the bottom frame (green) of the Measurement Model. These nine areas include all of the possible measures you can implement to build a complete solution.

Figure 2: Bersin & Associates Impact Measurement Framework® – The Nine Measurement Areas



Source: Bersin & Associates, 2006.

As Figure 2 shows, some of these are quite simple. Learner satisfaction and learning are identical to those discussed in the Kirkpatrick Model. In implementation, however, both are very powerful. In our research⁷, we discuss how various types of satisfaction and learning measures can provide very actionable results.

Measures of adoption are equally important. While more than 85 percent of all organizations measure enrollments in training, fewer than one-half measure actual training hours by employee and only 35 percent measure true completion on a regular basis. When the time

⁷ For more information, *High-Impact Learning Measurement: Best Practices, Models, and Business-Driven Solutions for the Measurement and Evaluation of Corporate Training*, Bersin & Associates / Josh Bersin, November 2006.



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comes to reduce costs and we need to cut back training programs, it is very important to have detailed information about the utilization of all programs, such as:

- Total enrollments;
- Student hours;
- Completion rates; and,
- Segmentation by audience (including job role, geography, facility, level, tenure and other dimensions).

You can quickly find problems in courses simply by analyzing adoption in detail.

The fourth measure in our Framework, utility, is a particularly important measure. Here we seek to understand how well the learners themselves rate the training in “usefulness” to their actual work environments. While we will not use this measure to compute return on investment, it varies very widely from learner to learner and program to program – and it gives us tremendous insights into how well we:

- Developed the right course;
- Targeted the right audience; and,
- Provided a delivery experience that was relevant and useful.

When compared across many programs, the “utility” measure is almost a perfect measure of real training value.

The fifth measure in our Framework, efficiency, is one that many organizations forget. While we may get a very positive outcome from a program, did we build and deliver it in a cost-effective way? There is a real cost to training – development, delivery, infrastructure and employee time. While some courses may be highly valued, we really need to compare them against others on the basis of total value to cost, since our dollars and resources are limited. Additionally, all training departments are cost centers, so we must use efficiency measures to make sure we are continuously driving down the cost per hour, cost per page, cost per enrollment, et al.

★ BEST PRACTICE

The Bersin & Associates Impact Measurement Framework includes a whole set of measures to clearly measure business alignment – from the beginning of the problem definition phase through the program rollout and follow-up course updates.

The sixth measure in our Framework, alignment, is also a new one – and one which is particularly important to understand. As we previously mentioned, no training program will drive value unless it is:

1. Highly relevant to the organization’s current business and talent challenges;
2. Timely and up to date in its delivery and content; and,
3. Completely adopted and well understood by management and leadership.

Our Framework includes a whole set of measures to clearly measure business alignment – from the beginning of the problem definition phase through the program rollout and follow-up course updates. We often tell clients that, if alignment is strong, you will never be asked to measure impact – so we encourage people to understand and implement the measurement of alignment early in your journey.

Measure seven, attainment, refers to the measurement of actual customer satisfaction. This type of measure may be considered a “one-stop” measurement for any internal business process. How well does your customer (e.g., the vice president of sales, the vice president of operations) feel that you obtained his / her stated goals? These goals may include performance enhancement, as well as other critical goals, such as:

- Completing the program on time and by a certain date;
- Staying within budget;
- Taking less than a certain number of hours of employees’ time; and,
- Engaging with other business programs taking place.

By considering attainment for every program, you ensure that you have a clearly documented set of “customer objectives” against which to measure yourself for each program – a discipline defined in great detail by the Six Sigma⁸ process.

⁸ For more information on Six Sigma, please visit <http://www.sixsigma.com>, which offers articles and easy-to-read examples of how to apply Six Sigma to any business process.



KEY POINT

If you carefully identify the business performance problems in advance, you will be able to capture this data directly from the business without formal ROI analysis.

Finally, we have measures eight and nine – individual and organizational performance improvement. While these measures are very important, we find training managers spending far too much time in this area. Highly effective organizations measure many things already (such as sales per employee, errors per hour and customer satisfaction levels) and, if you carefully identify the business performance problems in advance, you will be able to capture this data directly from the business without formal ROI analysis. Our research gives many examples of how to measure performance without formal and separate ROI analysis.

Summary: Keep It Simple

This short overview is designed to help you understand the Bersin & Associates Impact Measurement Framework – and to encourage you to learn more. *The Training Measurement Book*⁹ and *High-Impact Learning Measurement*¹⁰ both describe the Framework in detail, and provide a wide variety of tools and case studies to help you get started.

⁹ For more information, *The Training Measurement Book: Best Practices, Proven Methodologies, and Practical Approaches*, Josh Bersin / Pfeiffer, 2008.

¹⁰ For more information, *High-Impact Learning Measurement: Best Practices, Models, and Business-Driven Solutions for the Measurement and Evaluation of Corporate Training*, Bersin & Associates / Josh Bersin, November 2006

