



# Effectively Marketing Program Evaluation Strategies for Success

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For several decades HR/OD practitioners have sought effective ways of justifying the existence of their learning initiatives. While necessary, particularly in today's tumultuous, profit-centric economic environment, we may need to rethink how we are making our business cases.

It's difficult for most learning professionals to even conceive of a discussion about program evaluation that does not reference Donald Kirkpatrick and his four-level model, arguably the most widely used and popular model for the evaluation of training and our the industry standard. The four levels of Kirkpatrick's model, referencing ideas originally published in 1959 essentially measure:

- **Level 1: Reaction of learner** – what one thought and felt about the program
- **Level 2: Learning** – the resulting increase in one's knowledge or capability
- **Level 3: Behaviour** – extent of behaviour and capability improvement and implementation/application
- **Level 4: Results** – the effects on the business or environment resulting from the trainee's performance

More recently, learning thought leaders Phillips and Zuniga (2008) have even added a fifth level: Return on Investment (ROI) – a more complex calculation of the actual fiscal return that a program delivers relative to the company's investment.

From a technical perspective, who can argue with this model? It is, in fact compelling and comprehensive. Our concern, however, is one of practical applicability in today's workplace. That is, couched in these terms, the model lacks business relevance often leading to futile presentations of indigestible facts. In turn, while the data often suggests tremendous positive impact

on an organisation, that value cannot be fully recognised by key decision-makers the way it has been presented.

We suggest, traditional program evaluation strategies are not replaced, but rather infused with a more marketable context that can help business leaders better absorb and hence, recognise the true value of these results. The context we suggest is not a new one – in fact, it is one that business process guru Peter Block has spent the better part of his career coaching his clients around – the practice of “contracting” with our clients.

## A Context for Success In Program Evaluation

Peter Block, in his book *Flawless Consulting* (1999), laid out an exceptionally powerful context for achieving “buy-in” from executive sponsors by aligning learning and human capital strategies with key business objectives at the outset rather than simply presenting results in a vacuum after the money has been spent on an initiative.

To that end, if the objective is to help business leaders recognise the value of learning, we can make best use of our time by increasing our focus on effective “contracting” or:

- 1) **Scoping** – Understanding the business leaders' desired outcomes, determining what we can do to best achieve those outcomes, and how we'll measure our progress (The learning team partners with the business leaders in supporting a strategic initiative by jointly answering key questions: Are there key strategic initiatives that need to be supported?

Are there ambitious goals or metrics in the business plan that needs an extra push? What constraints exist i.e. budget, logistics, etc.)

- 2) **Setting expectations** – Gaining agreement from the business leaders as to both the plan of action and the measures that will be used to determine success (The learning team seeks “buy-in” for an intervention that simultaneously supports the business drivers identified in the initial conversation, and fits within the constraints outlined including the measurement strategy.)
- 3) **Data collection** – Executing on the negotiated strategy (The learning team designs and rolls-out the agreed upon program.)
- 4) **Gap Analysis and Recommendations** – Presenting the results of the data collection against the initial success metrics to show tangible value-add in terms of the business leaders' original desired outcomes (The learning team presents training outcomes relative to the success measures agreed upon at the outset, highlighting any gaps or recommendations for improving the program in the future.)

In contrast to what seems to have become the commonplace means of executing program evaluation in a vacuum, only in Step 4 (presentation of the gap analysis and recommendations) do the learning professionals focus on the actual rigor of the program evaluation strategy (e.g. through a Kirkpatrick-esque type of analysis). Steps 1-3 additionally provide the necessary context

in which to help the executive sponsors link such a thorough analysis to something that is meaningful to the business.

This consultative context – the additional steps taken – effectively sets the stage for a more successful learning intervention and one with outcomes that can be more easily packaged for executives post-program. The essence of this approach, therefore, is to ensure a significant amount of active discussion and negotiation on the part of the business partners who, as a result of their initial involvement and choices in direction – will ultimately have more of a stake in a positive outcome. Stated simply, positioned as process consultants focused on competitive advantage, the learning team appears strategically focused on highly visible business objectives, outcomes, and costs rather than on technicalities and nice-to-haves that are typically cut during a downturn.

### A Smart Strategy For Positioning Learning Initiatives

Not only does the contracting process set a learning team up for success in packaging results to key decision-makers, but this conversation has a number of ancillary but substantial benefits that should also be considered:

- Promoting enhanced executive commitment to the initiative during the contracting phase, can readily translate into greater support from participants'

supervisors during actual program roll-out, further improving the opportunity to obtain positive results.

- After partnering with business leaders during the contracting phase, learning leaders often come to speak a language more closely aligned with the operations of the business rather than one that is fraught with HR/OD jargon.
- Through contracting learning leaders gain up-front, specific agreement regarding measures of success in which they proactively set the stage for the analysis to come, in turn, ensuring openness to a meaningful post-program conversation.
- In contracting, learning leaders take a consistent approach to that of other organisational cost centers that are expected to justify the value of their initiatives using tangible estimates of ROI (e.g. Marketing and IT.) In much the same way that these departments are often successful in obtaining funding by proposing projects in tandem with anticipated ROI, Learning can expect to enjoy the same opportunity for success!

In short, while learning professionals have been traditionally inclined to discuss program outcomes in terms of incremental improvements in learner knowledge and/or competency performance, executives are more comfortable discussing the business in less theoretical (and more applied) ways. By understanding the practical outcomes

that executive leaders value, the learning team is far better prepared to gather the information that will have the most impact on the business, the strategy, and—ultimately the executive’s impression of the program and its value to the company.

So, by all means, utilise a detailed analysis of Kirkpatrick’s four levels to demonstrate how a learning platform achieves its objectives, but be sure to do it in the context of what your key stakeholders value! ■

#### References:

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