

L&D Detective Kit Impact Templates

 Kevin M. Yates

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The L&D Detective

Known in the global learning and development (L&D) community as “the L&D detective,” Kevin M. Yates answers the question, “What is the impact of learning?” He solves measurement mysteries and investigates how learning activates performance and business goals using facts, clues, evidence, and data.

Kevin’s career in the learning and development profession includes over 20 years of experience in local and global roles for facilitation, instructional design, learning solutions design, learning technology, curriculum development, program management, leadership development, learning operations, learning analytics, and impact analysis.

Kevin has experience working in industries including education, financial services, insurance, news media, marketing, professional services, food services, and social media.

His reach is worldwide through in person and virtual keynote presentations, panel discussions, and workshops across the globe. Kevin also shares his experience and expertise for measuring impact in industry magazines, online articles, blogs, podcasts, and live streams.

In his own words, “My message is firmly rooted in the belief that measuring impact is possible, necessary, and actionable. I want to inspire the global learning and development community to have a mindset for measurement. I tell the truth about challenges for measuring impact and share methods that make it possible.”



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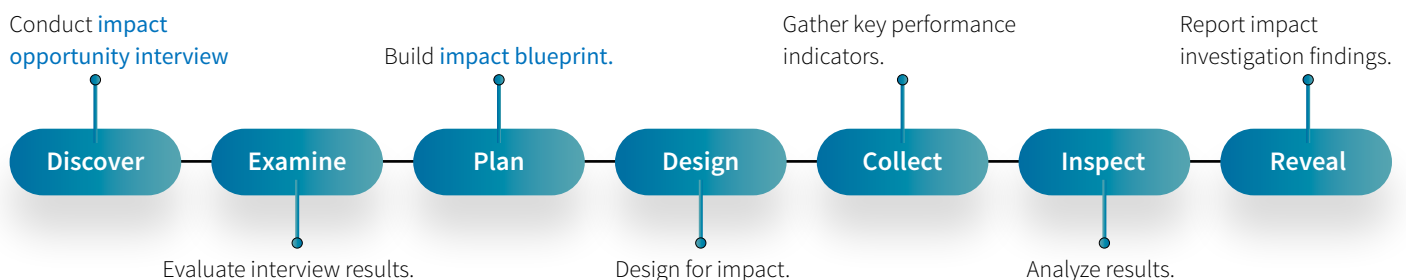


The L&D Detective Kit Templates accompany the *L&D Detective Kit for Solving Impact Mysteries*®. There are templates for **impact standards**, **impact opportunity interview**, **impact blueprint**, and **impact design**. Use these templates to solve measurement mysteries and conduct your own impact investigation.

L&D Detective Guiding Principles

- ☆ #1 Performance is the North Star for impact investigation.
- 🎯 #2 Impact is intentional, specific, purposeful, and targeted.
- 📅 #3 If you don't plan for impact in the beginning, it will be difficult to measure in the end.
- 🔍 #4 Find one thing about performance you can attribute to learning and let that lead to the facts for impact.
- 📄 #5 Investigating impact may not be easy, but it is possible.

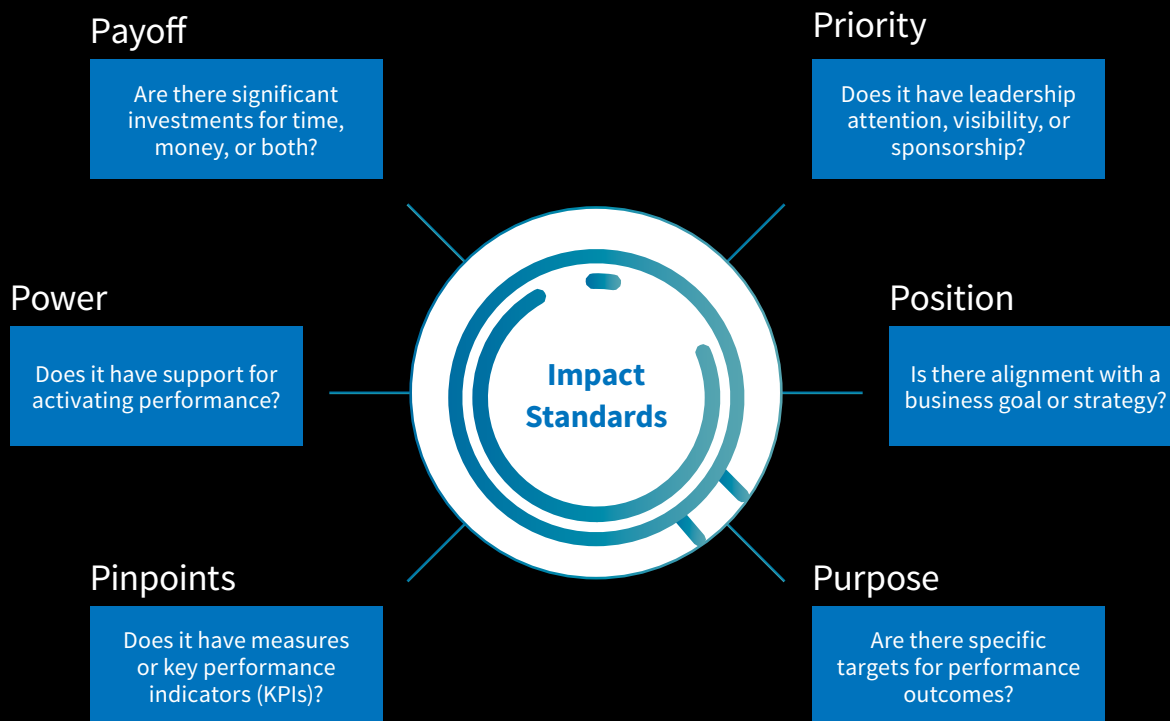
Impact Investigation Timeline





Impact Standards Template

Impact standards build the case for measuring the impact of learning. Standards ensure that L&D detective work is focused on learning solutions purposefully designed for impact. Standards also ensure there is opportunity for impact. *Reference page 3 in the L&D Detective Kit for Solving Impact Mysteries©.*

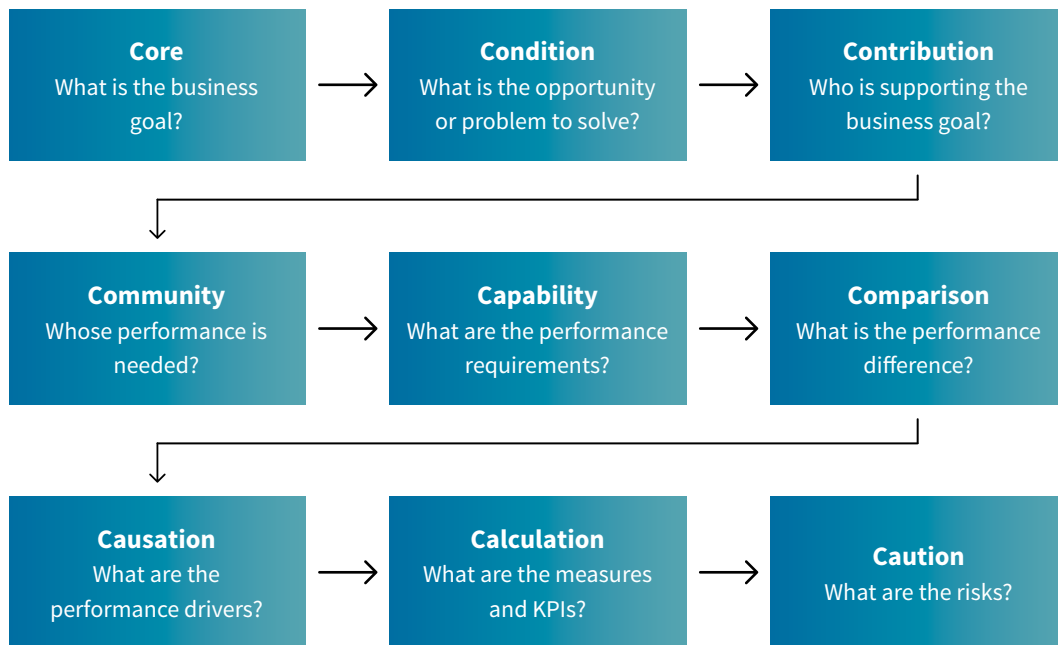


| | Investigate | Yes | No | Evidence |
|-----------|--|-----|----|----------|
| Priority | Does it have leadership attention, visibility, or sponsorship? | | | |
| Position | Is it aligned with a business goal or strategy? | | | |
| Purpose | Are there specific targets for performance outcomes? | | | |
| Pinpoints | Does it have measures or key performance indicators (KPIs)? | | | |
| Power | Does it have support for activating performance? | | | |
| Payoff | Are there significant investments for time or money? | | | |



Impact Opportunity Interview Template

Training is often presumed a solution before collecting information about the business opportunity or problem at hand. Learning and development teams do not have magic wands, and there are times when L&D does not have the appropriate solution. The **impact opportunity interview** proactively reveals when learning has potential for impact, as well as when learning is not the solution. *Reference page 6 in the [L&D Detective Kit for Solving Impact Mysteries](#)©.*



Core

Investigate

What is the business goal?

Intention

Identifies business focus and priority.

Insight

There is a difference between a business goal and a training goal. Accelerate growth by 20%, reduce errors by 30%, improve customer ratings from 3 points to 5 points are examples of business goals. Design five courses for 2,500 employees by the end of the third quarter is a training goal. The answer to this question about the business goal identifies the priority and the measure for success for the business goal.

The best-case scenario is a business goal with a quantified target: i.e. 10% growth, 2-point increase, or one-hour reduction. However, if the goal is simply “improve errors,” how do you know when errors are sufficiently improved? A quantified goal defines success.

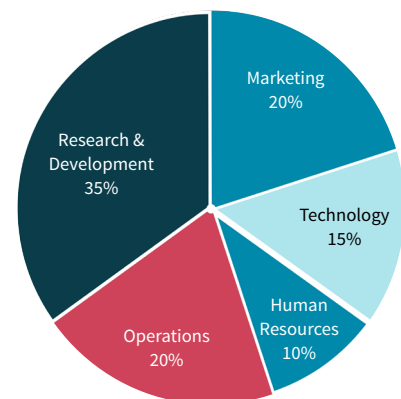
Condition

| | |
|-------------|---|
| Investigate | What is the opportunity or problem to solve? |
| Intention | Creates perspective, purpose, and context for the business goal. |
| Insight | Is there opportunity for growth? Is there a need to correct a situation or change a process? Do market conditions require a specific business response? The answer to this question about condition frames the purpose of the business goal. There's also opportunity to contextualize the learning experience. |

Contribution

| | |
|-------------|---|
| Investigate | Who is supporting the business goal? |
| Intention | Reveals cross-functional partners that have ownership for achieving the business goal. |
| Insight | <p>It takes a team to win. The idea that training alone will achieve a business goal is a false assumption. The answer to this question reveals cross-functional partners who play an active role in achieving the business goal.</p> <p>Identifying cross-functional partners manages expectations for learning's role. There is also opportunity for removing redundancy in efforts and supporting each other's effort. Contribution to goal – demonstrated in the figure below – is an agreed upon estimate of each partner's input.</p> |

Cross-Functional Partners % Contribution



20% contribution from marketing + 15% contribution from technology + 10% contribution from human resources + 20% contribution from operations + 35% contribution from research and development = 100% contribution to goal.

100%

Community

| | |
|-------------|---|
| Investigate | Whose performance is needed? |
| Intention | Identifies people and teams, based on role, who are needed to achieve the business goal. |
| Insight | Who are the people expected to help achieve the business goal? What are the dynamics and demographics of their roles? How and where do they work? The answers to these questions ensure clear focus on and understanding of the target audience and informs decisions for program design. |

Capability

| | |
|-------------|---|
| Investigate | What are the performance requirements? |
| Intention | Reveals specific capabilities needed to achieve the business goal. |
| Insight | <p>Performance requirements are not what people need to learn, know, or understand. Performance requirements are the behaviors, capabilities, and actions that achieve the business goal. The answer to this question uncovers what people must do to achieve the business goal.</p> <p>The interviewee may struggle with answering this question. He or she may start with, “We want people to know...,” “We need people to understand...,” or “People need to learn...” Instead, try using these prompts:</p> <ul style="list-style-type: none"> • What does understanding or knowledge look like when it shows up on the job? • If someone knows or understands, what do they do? • What do effective behaviors and actions look like? <p>Performance requirements must be specific, targeted, and clearly defined.</p> |

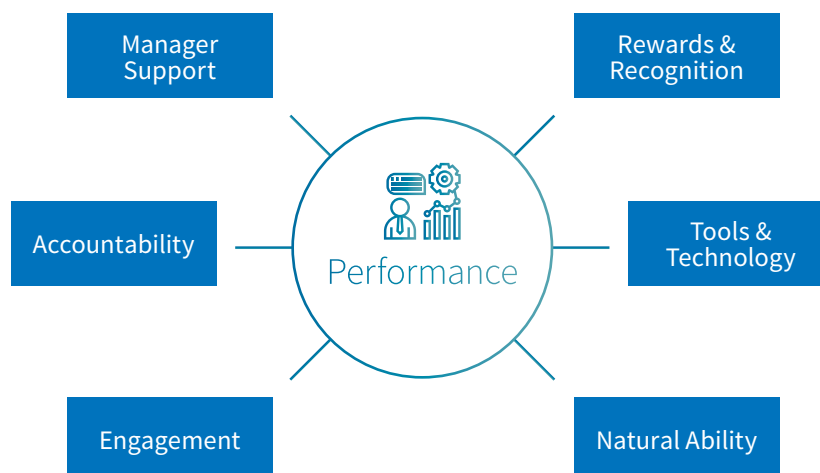
Comparison

| | |
|-------------|---|
| Investigate | What is the performance difference? |
| Intention | Uncovers the distinction between current capability and the capability necessary to achieve the business goal. |
| Insight | What evidence shows that people are not performing or behaving as needed to achieve the business goal? What is the difference between where performance is and where it needs to be? The answers to these questions help determine when learning is a potential solution. These answers also build the foundation for measuring impact. |

Causation

| | |
|-------------|---|
| Investigate | What are the performance drivers? |
| Intention | Identifies variables that influence performance. |
| Insight | There are a variety of inputs that activate performance for achieving the business goal. All inputs must be taken into consideration to ensure they are activated accordingly. The answer to this question – demonstrated in the figure below – manages expectations for where learning can influence performance, where it cannot, and where L&D can support and reinforce performance activators. |

Example of Performance Drivers



Example of Measures and KPIs



Market share



Employee performance



Customer satisfaction



Operations



Quality



Time



Growth



Errors



Volume



Engagement

Calculation

Investigate

What are the measures and KPIs?

Intention

Reveals metrics and data that demonstrate results, movement toward goal, and success.

Insight

What are the key performance indicators (KPIs) that measure progress toward the goal? Are there metrics that demonstrate the connection between people performance and business performance? Who owns the data? The answers to these questions are the foundation for evidence and data that reveal impact and results.

Points of consideration for data include accessibility, confidentiality, and General Data Protection Regulation (GDPR). You may be able to aggregate and anonymize data to maintain privacy and confidentiality. Additionally, consider timing and the support necessary from data owners for reporting, visualization, and analysis.

Caution

Investigate

What are the risks?

Intention

Uncovers threats to performance for achieving the goal.

Insight

Are there potential obstacles to or inhibitors of performance? Is there something that may prevent the business from achieving the goal that has nothing to do with performance? Identifying threats informs decisions for mitigating and addressing barriers to performance.



Impact Blueprint Template

L&D detective guiding principle number three is, “If you do not plan for impact in the beginning, it will be difficult to measure in the end.” The **impact blueprint** is the plan for activating performance with training and learning. It is the impact roadmap and includes the business goal, targets for performance, and impact measures. *Reference page 15 in the [L&D Detective Kit for Solving Impact Mysteries©](#).*

Background

Impact Opportunity

Business Goal Alignment

Performance Targets

Business Performance and People Performance Measures

Report Timing

Owner/Partner

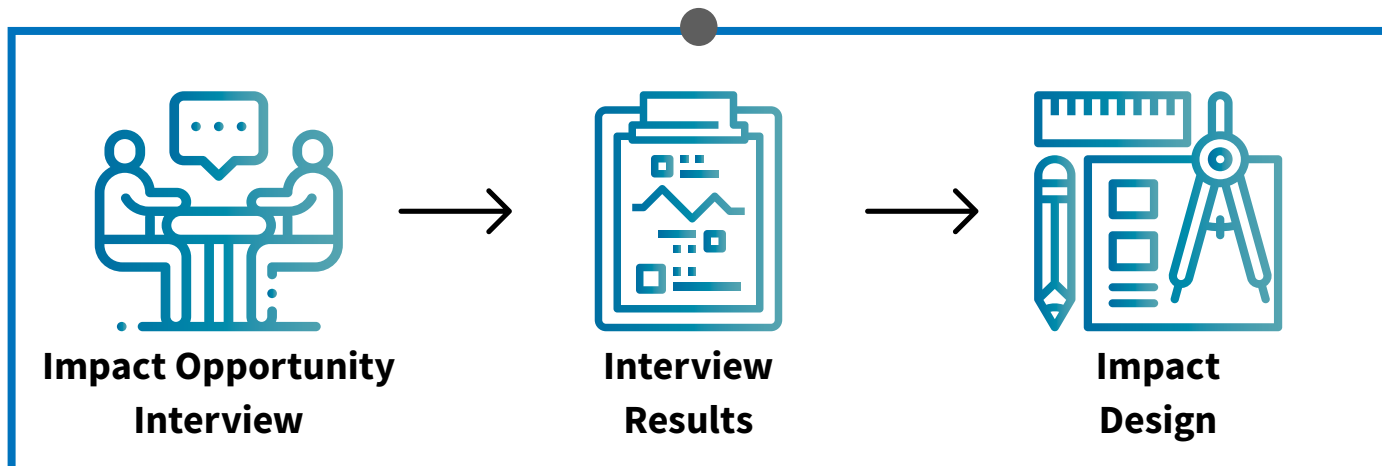
% Contribution

Learning Solutions



Impact Design Template

Impact design uses results from the [impact opportunity interview](#) to create a learning experience purposefully designed for impact. Learning outcomes produce performance outcomes that achieve the business goal. Impact begins with instructional design that activates performance. *Reference page 17 in the [L&D Detective Kit for Solving Impact Mysteries](#)®.*



Core

What is the business goal?

How will you reinforce alignment between the business goal and the learning solution?

- Create videos with leaders describing the business goal and illustrating alignment with the learning solution.
- Describe learning alignment with the business goal in marketing messages and learning solution description.
- Create script for the facilitator or narrator that details the connection between learning and the business goal.

Condition

What is the opportunity or problem to solve?

How will you contextualize the situation for the business goal as part of the learning experience?

- Describe the conditions that prompted the business goal in marketing and communication messages for the learning solution.
- Use circumstances for the business goal to create similar scenarios in the learning experience.
- Create script for the facilitator or narrator that explains the circumstances prompting the business goal.

| Contribution | Who is supporting the business goal? |
|--|--|
| <p>How will you collaborate with cross-functional partners who also support the business goal?</p> <ul style="list-style-type: none"> • Identify what other contributors are doing to support the business goal. • Examine opportunities to remove redundancies. • Explore where learning can leverage and support other business goal contributors. | |
| Community | Whose performance is needed? |
| <p>What are the design considerations for the target audience?</p> <ul style="list-style-type: none"> • Identify local language needs. • Create scenarios and simulations that reflect unique cultural norms, or design the learning experience with a broad context for scalability. • Consult with target audience representation groups for feedback on making content relevant, meaningful, and actionable. | |
| Capability | What are the performance requirements? |
| <p>How will you connect learning outcomes with performance targets?</p> <ul style="list-style-type: none"> • Use performance outcomes versus learning objectives.* • Describe performance outcomes in marketing messages and the learning solution description. • Create script for the facilitator or narrator describing performance goals. • Use video to illustrate behaviors and actions that achieve the business goal. • Demonstrate how to address barriers to performance and what happens when performance is activated on the job with real-world scenarios. • Use role-plays and simulations to practice behaviors and build confidence. | |

*Performance Outcomes versus Learning Objectives

Traditional learning objectives begin with, “You will learn...”, “You will know...”, or “You will understand...” Performance outcomes are action-based and describe the skill or capability.

| Traditional Learning Objectives | Performance Outcomes |
|--|--|
| You will understand the importance of effective communication. | Remove communication barriers when working with people who have a style of communicating different than yours. |
| You will know how to handle conflict. | Manage and resolve conflict by interpreting behavior instead of responding emotionally. |
| You will learn the importance of emotional intelligence. | Adapt your behavior when working with people who have a style of working that is different than yours. |

L&D detective guiding principle number one is, “Performance is the North Star for impact investigation.” Impact is when learning activates performance and the business goal. Performance outcomes are the focus for impact investigation.

| Comparison | What is the performance difference? |
|---|-------------------------------------|
| <p>How will you address the need to move performance from where it is to where it needs to be?</p> <ul style="list-style-type: none"> • Use video to illustrate the difference between performance that achieves the business goal and behaviors that inhibit achievement of the business goal. • Use role-plays and simulations to practice behaviors and build confidence. • Demonstrate the difference in outcomes when behaviors that support the business goal are practiced and when they are not. • Create a script for the facilitator or narrator that reinforces the critical need for applying what was learned to achieve the business goal. | |
| Causation | What are the performance drivers? |
| <p>What strategies will you use to activate performance influences within L&D's control?</p> <ul style="list-style-type: none"> • Identify drivers where learning or performance support can impact performance outcomes. • Create supplemental solutions to activate performance. | |
| Calculation | What are the measures and KPIs? |
| <p>How will you consider data for learning performance, employee performance, and business performance?</p> <ul style="list-style-type: none"> • Create scripts for the facilitator or narrator that explain impact metrics for employee and business performance. • Include an illustration in the learning experience that demonstrates the connection between learning, performance outcomes, the business goal, and impact measures. • Use learning surveys to measure learning effectiveness. • Create a script for the facilitator or narrator that encourages completion of the learning survey. • Use business simulation scores to measure knowledge. • Use performance support accesses to measure utilization. | |
| Caution | What are the risks? |
| <p>How will you address threats to performance?</p> <ul style="list-style-type: none"> • Identify potential performance blockers. • Address as needed in the learning solution. | |



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