# L&D Detective Kit for Solving Impact Mysteries

Kevin M. Yates

# Kevin M. Yates,
# 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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# Impact Mysteries

I am a learning and development detective, and I solve mysteries. I solve the mystery: What is the impact of learning? I use facts, clues, evidence, and data to measure outcomes and results.

My confidence in the value of L&D detective work comes from my beliefs. I believe learning fulfills its highest purpose with performance activation. For me, L&D detective work is measuring fulfillment of purpose.



## THE L&D DETECTIVE

I do not believe you can indiscriminately attribute change in performance or achieving a business goal solely to training. There are multiple conditions and inputs that activate performance and achieve business goals. However, I do believe you can produce a compelling preponderance of evidence that demonstrates how learning activates performance and drives business goals by influencing behavior change.

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Natural ability, motivation, rewards, recognition, manager support, tools, and technology – to name a few – activate performance. Training and learning are just two contributors to a multitude of activators. My role as an L&D detective is uncovering when a change in performance or the achievement of a business goal is uniquely influenced by learning.

## 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.

*"My role as an L&D detective is uncovering when a change in performance or the achievement of a business goal is uniquely influenced by learning."*

L&D detective work can be complicated and tricky. Discovering facts, clues, evidence, and data that demonstrate impact can be complex and challenging. I am sharing my L&D detective techniques to reduce complexity and make impact measurement mysteries easier to solve.

> **IMPACT** IS WHEN LEARNING **ACTIVATES** PERFORMANCE AND A BUSINESS GOAL.

These guiding principles give L&D detective work its purpose and meaning. They are the foundation for investigating impact and solving measurement mysteries. You will see elements of these guiding principles throughout the L&D detective kit.

## What is Impact?

L&D detective work is centered on a very specific definition of impact. Impact is when learning activates performance and a business goal. Impact is activation.

All learning solutions are not created with the same purpose. There are training or learning solutions intended to create awareness, build knowledge, demonstrate compliance, mitigate risks, or fulfill professional development requirements. Activating performance is not always the goal, and that's okay.

However, you must be on the same page with business partners, internal clients, and stakeholders when you define and manage expectations for impact. A 60-minute lunch and learn or 30-minute eLearning module is not likely to have quantifiable impact. Do not try to measure impact, as we defined it, for these. Measure fulfillment of their purpose instead.

Investigating impact is as much about examining what happened as a result of training as it is about examining what would not occur in its absence. Can you produce unequivocal evidence that something happened strictly because of training? I do not believe you can. Can you produce evidence for learning's influence on performance, behavior, actions, and business goals? I believe you can.
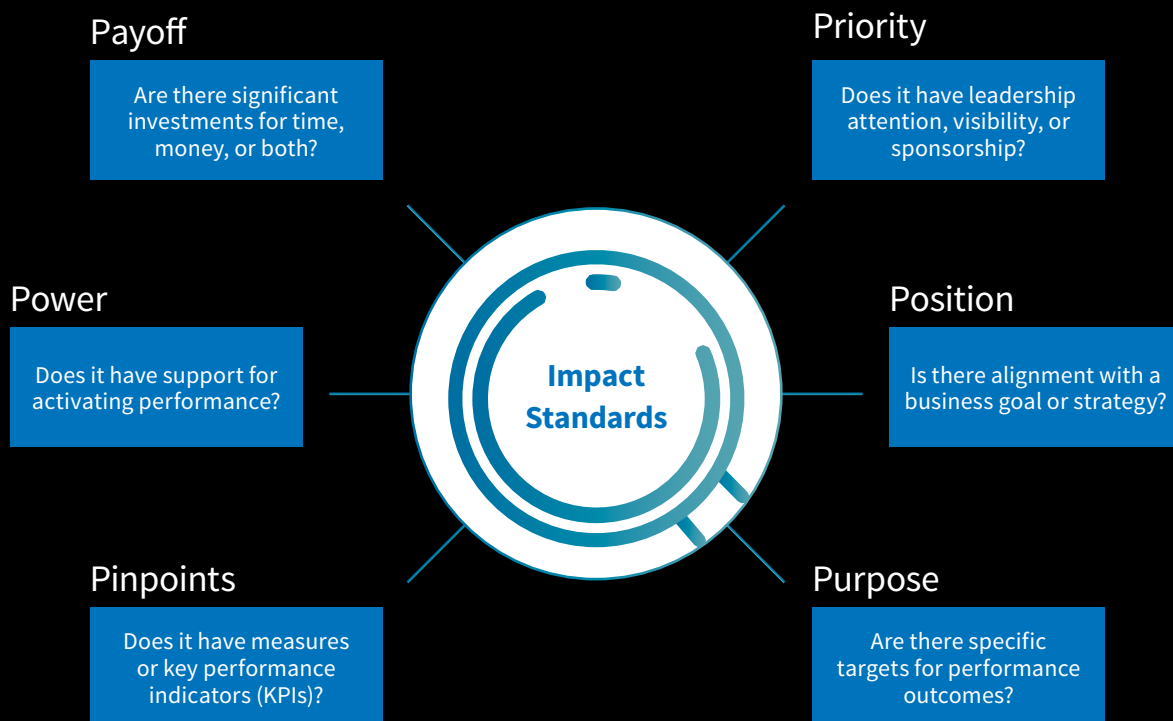
## What's Next?

What are the characteristics of learning solutions that have potential for impacting performance and business goals? How do you know if you should investigate impact, as we defined it, or not? The next section illustrates how to build the case for an impact investigation with impact standards.

# Impact Standards

How do you know which learning programs and solutions are eligible for impact investigation? Which training programs require the time, resources, and effort it takes to measure impact? Is the learning solution for which you are trying to measure impact designed with the intent to activate performance and meet a business goal?

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.

## Payoff
Are there significant investments for time, money, or both?

## Priority
Does it have leadership attention, visibility, or sponsorship?

## Power
Does it have support for activating performance?

**Impact Standards**

## Position
Is there alignment with a business goal or strategy?

## Pinpoints
Does it have measures or key performance indicators (KPIs)?

## Purpose
Are there specific targets for performance outcomes?

## Priority

| Investigate | Does it have leadership attention, visibility, or sponsorship? |
|---|---|
| Intention | Achieving business goals is the top priority of leadership and should be the priority of L&D. When leaders champion employee development with their endorsement and messaging, evidence for impact is necessary. When leaders support investment in employee development for achieving a business goal, impact investigation is required. |

## Position

| | |
|---|---|
| Investigate | Is there alignment with a business goal or strategy? |
| Intention | Alignment means intentional connection. It means strategic links are present for training, learning, and the business goal. When there is agreement that learning is part of the winning strategy, there's eligibility for an impact investigation. |

## Purpose

| | |
|---|---|
| Investigate | Are there specific targets for performance outcomes? |
| Intention | Performance targets are not the knowledge or understanding acquired from training. A performance target is a behavior, action, or capability that achieves the business goal. Training solutions with specific performance targets are eligible for impact investigation. |

## Pinpoints

| | |
|---|---|
| Investigate | Does it have measures or key performance indicators (KPIs)? |
| Intention | It is difficult to measure impact without specific indicators to show results. Measures and key performance indicators are evidence for impact. A learning solution must have specific, defined measures to be eligible for an impact investigation. |

## Power

| | |
|---|---|
| Investigate | Does it have support for activating performance? |
| Intention | A single event may activate performance. However, a learning experience with reinforcement and continuous support is more likely to change behavior and actions. If the training solution has on-going triggers in place to activate performance over time, it is eligible for an impact investigation. |

## Payoff

| | |
|---|---|
| Investigate | Are there significant investments for time, money, or both? |
| Intention | There are three ways to think about investments in training: monetary costs for design and delivery, time for design and delivery, employee hours invested in learning. The more investment, the greater the expectation for return on investment. Learning projects with substantial investments in time, money, or both are eligible for an impact investigation. |

## Do All Standards Have to be Met to Conduct an Impact Investigation?

There is no one right answer to this question but consider this: **Impact standards** are clues about the extent to which a learning solution was designed with the purpose of impacting performance and business goals. The fewer the standards met, the less likely it is that there's potential or opportunity for impact.

Here's why this is important: Training and learning solutions without **impact standards** are difficult to measure. Before you try to measure impact, use the standards to ensure there's purpose and intention for impact first. You can also use **impact standards** to manage expectations for training and learning solutions that are most appropriate for measuring how learning activated performance and a business goal.

## 🔍 What's Next?

How do you proactively plan for **impact standards?** What are the steps for ensuring there are clearly defined intentions and measurable outcomes for training? The next section demonstrates how to conduct an **impact opportunity interview** for proactive impact planning prior to the design and deployment of your learning solution.
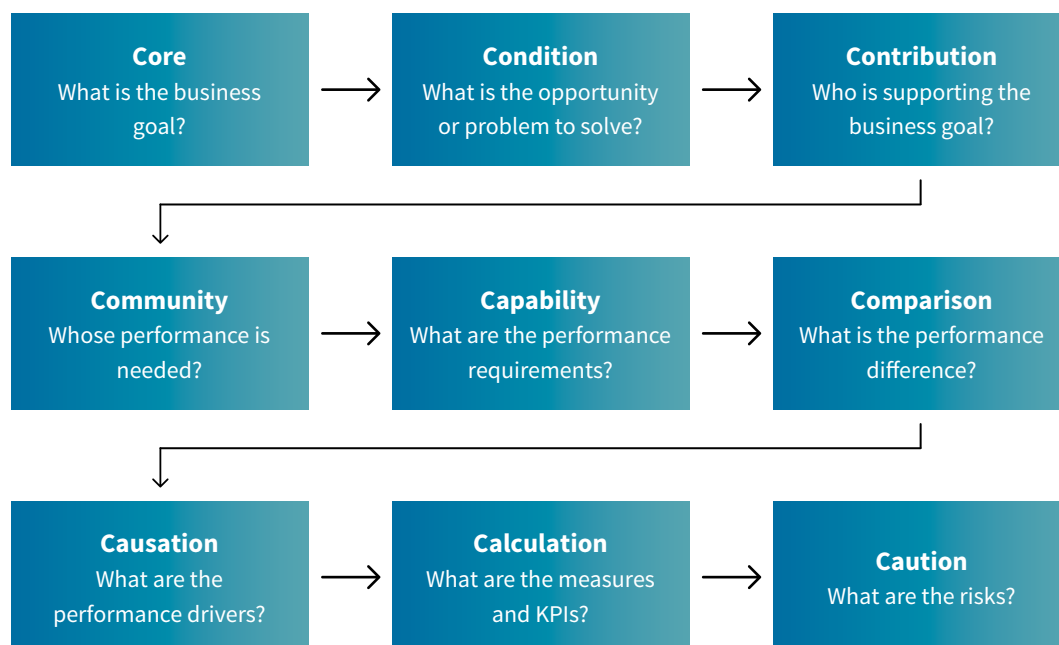
# Impact Opportunity Interview

## Impact Opportunity Interview

The most prevalent challenge for impact investigations is not uncovering impact expectations before the learning solution is deployed. Unfortunately, training programs are usually designed without specific targets for performance outcomes and business goals. Impact is an afterthought, and that makes measuring impact difficult.

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.

*"The impact opportunity interview transforms the view, the engagement, and the role of L&D from order takers to impact makers!"*

Some view learning and development as a transactional fulfillment center where business functions go to place orders, "I'd like one virtual classroom training with a side order of digital learning to go, please," and L&D takes and delivers "the order". The impact opportunity interview transforms the view, the engagement, and the role of L&D from order takers to impact makers!

| **Core** <br> What is the business goal? | → | **Condition** <br> What is the opportunity or problem to solve? | → | **Contribution** <br> Who is supporting the business goal? |
|---|---|---|---|---|
| **Community** <br> Whose performance is needed? | → | **Capability** <br> What are the performance requirements? | → | **Comparison** <br> What is the performance difference? |
| **Causation** <br> What are the performance drivers? | → | **Calculation** <br> What are the measures and KPIs? | → | **Caution** <br> What are the risks? |

## 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.<br><br>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 | 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.<br><br>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 on the next page – is an agreed upon estimate of each partner's input. |
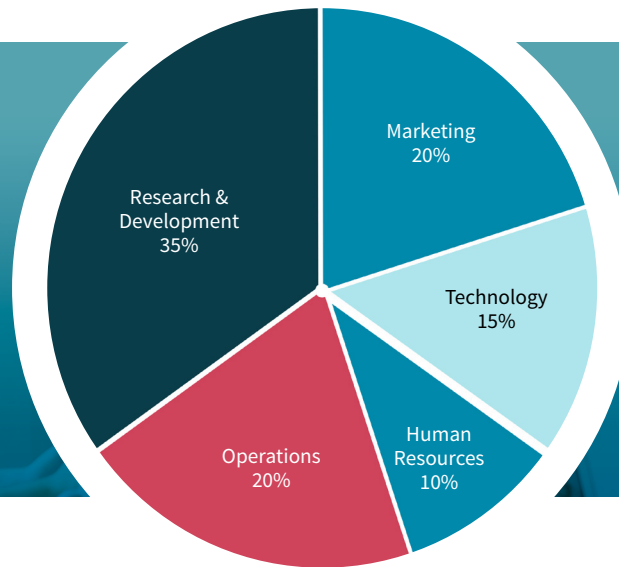
*Example of Contribution to Goal*

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.

## 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 | 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. |

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:

- 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?

Performance requirements must be specific, targeted, and clearly defined.

# Example of Measures and KPIs

........................

**Market share**

**Employee performance**

**Customer satisfaction**

**Operations**

**Quality**

**Time**

**Growth**

**Errors**

**Volume**

**Engagement**

## 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. |

## Calculation

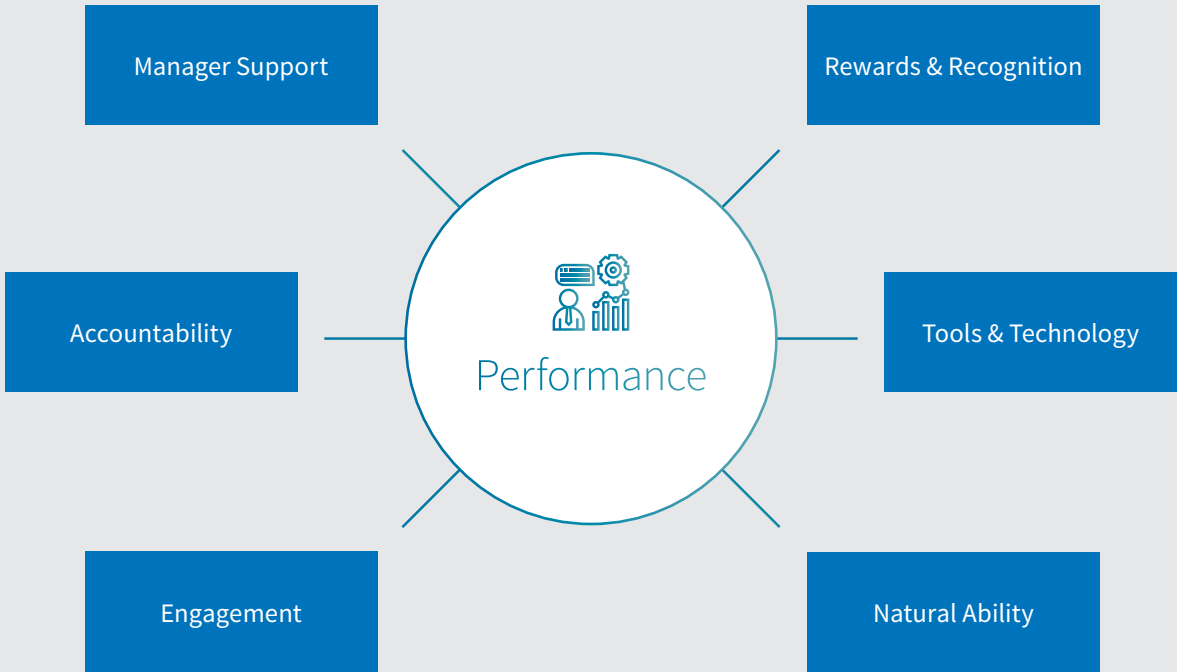| Investigate | What are the measures and KPIs? |
|---|---|
| Intention | Reveals metrics and data that demonstrate results, movement toward goal, and success. |
| Insight | What are the key performance indicators (KPIs) that measure progress toward the goal? Are there metrics that demonstrate the connection 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. |

## Example of Performance Drivers

Manager Support

Rewards & Recognition

Accountability

Performance

Tools & Technology

Engagement

Natural Ability

## 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. |

# The L&D Detective Says…

A concern I often hear regarding impact opportunity interviews is: "My internal clients and business partners don't have time for me to ask these questions. I can barely get 30 minutes of their time. They just want me to deliver the training solution they believe they need. How can I have this kind of discussion with limited time and attention?"

This question is a legitimate concern. Here are my thoughts:

- Send the impact opportunity interview questions in advance.
- Ask the interviewee which questions they can answer, which ones they cannot, and direction to the people who can.
- Let them know you can take their "request for training," but doing so minimizes opportunity for a learning solution with measurable impact.
- If impact is not the goal and there is another purpose for the training, you have managed expectations accordingly.
- If operating at the speed of business does not allow for time to discover impact opportunity, be honest and courageous when telling the truth about expected results and outcomes.

And remember this:

- Conduct the impact opportunity interview before the training solution is designed and deployed.
- The discussion is firmly rooted in curiosity and discovery and should focus on collecting facts about the organizational and performance requirements to achieve the business goal.
- If the discussion shifts to the learning solution, you are having the wrong discussion.
- You will more than likely need to interview more than one person to get all the answers.
- The discussion is a shift from L&D as an order fulfillment center for training requests to L&D as a consultative and trusted advisor to the business.

## What's Next?

Results from the impact opportunity interview reveal when training is a solution and when it is not. There's also discovery for impact opportunity.

The next section illustrates results from an impact opportunity interview with a case study.
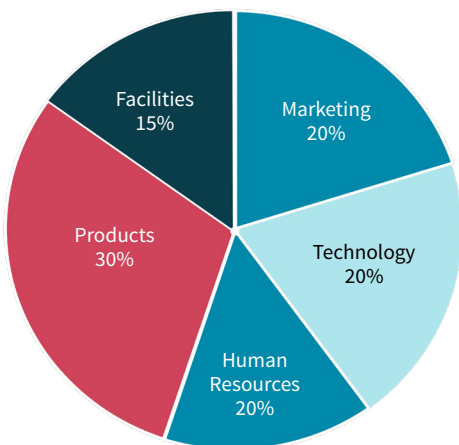
# Case Study 1: Impact Opportunity Interview for Global Gems

Global Gems is a luxury brand with a 100-year history in the precious stones industry. It has stores in Africa, Asia, Australia, Europe, Latin America, and North America catering to wealthy customers looking for one-of-a-kind jewelry and a high-end customer experience. The business has been successful and profitable over the years but is seeing a decline in sales across all stores

## Impact Opportunity Interview Results

Mustafa Nysem, director of global sales, requested training for the sales team. He owns the business goal for growth. The L&D team conducted an impact opportunity interview. Here are results:

| Core | What is the business goal? |
|---|---|
| | 30% growth |

| Condition | What is the opportunity or problem to solve? |
|---|---|
| | Sales are down 15% from prior year, and customer satisfaction scores are declining. Post-sales feedback from customer phone interviews, comments on the website, social media, and consumer websites indicate customers are not having good experiences. Store interiors are outdated, sales transactions are cumbersome, and product lines have decreased over the years. The brand is perceived as catering to older clientele, and salespeople show signs of apathy and ambivalence regarding customer care. |

| Contribution | Who is supporting the business goal? |
|---|---|
| | Marketing owns rebranding. Technology owns implementation of tablets for mobile point-of-sale transactions. Human resources owns recruiting for sales roles. Products owns sourcing for new jewelry. Facilities owns store remodeling. The goal owner and contributors have estimated and agreed upon contribution to goal. |

| Community | Whose performance is needed? |
|---|---|
| | Gem care specialists interact closely with customers and are the primary source of sales growth. They are spread across the globe working in different countries, different languages, and different cultural norms. The average gem care specialist has over 20 years of experience in the same store with comprehensive industry expertise in gemology. |

Facilities 15%

Marketing 20%

Products 30%

Technology 20%

Human Resources 20%

*Cross-Function Contribution to Goal*

## Capability

### What are the performance requirements?

There are four capabilities for customer interactions that lead to a sale.

| Capability | Performance Requirement |
| --- | --- |
| Product knowledge | Describe make, value, origin, and authenticity. |
| Intentional engagement | Actively listen to customers, and interpret non-verbal clues. |
| Managed persuasion | Assess interest, evaluate doubts, address concerns, and drive desire. |
| Luxury care | Create a personalized and luxurious in-store experience. |

## Comparison

### What is the performance difference?

Results from customer satisfaction scores show current performance:

| Capability | Current* | Required |
| --- | --- | --- |
| Product knowledge | 5 | 5 |
| Intentional engagement | 2.1 | 5 |
| Managed persuasion | 2.9 | 5 |
| Luxury care | 2.9 | 5 |

*Average customer satisfaction score for all stores.*

## Causation

### What are the performance drivers?

Gem care specialists performance influences include compensation, commission, store manager relationship and support, experience, sales capability, motivation, and inclusion in decision-making.

## Calculation

### What are the measures and KPIs?

- Quarterly store sales.
- Customer satisfaction scores.
- Employee engagement scores for investment in development.
- Employee engagement scores for belief in company's future.
- Merisol Osinga owns quarterly sales data.
- David Lenox owns customer satisfaction data.
- Barbara Ng owns employee engagement data.
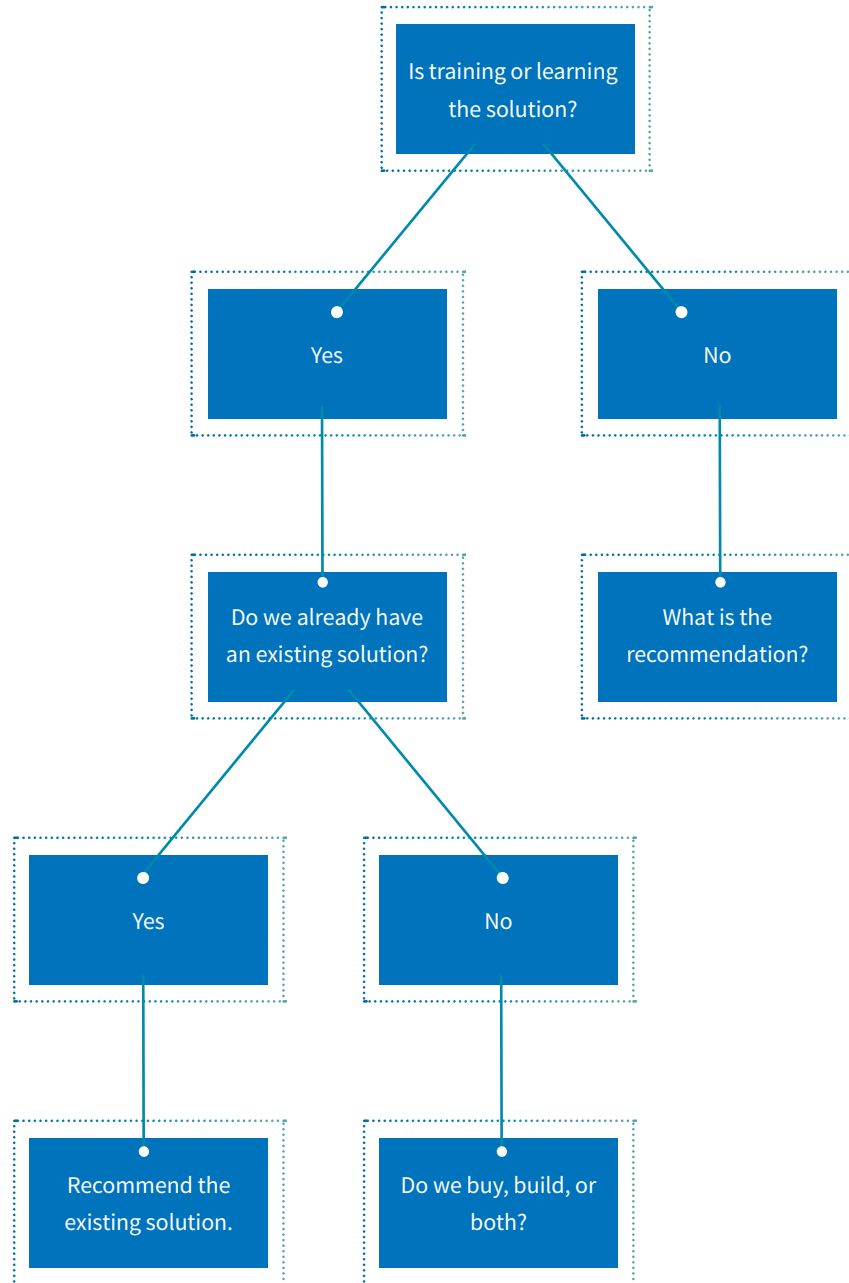- Jafari Adebayo supports data science and reporting.

## Caution

### What are the risks?

- The market for luxury jewelry is shrinking, but the business believes it can achieve growth with a high volume of lower-priced items versus a low volume of higher-priced items.
- A reduction in sales commission may impact motivation to sell.
- Employee engagement scores indicate low confidence in Global Gems future.

## Impact Opportunity Decision Tree

Results from the **impact opportunity interview** reveal when training is a potential solution.

The **impact opportunity decision tree** helps inform the direction moving forward.

```
                    Is training or learning
                         the solution?
                       /              \
                    Yes                No
                     |                  |
           Do we already have    What is the
           an existing solution?  recommendation?
              /          \
            Yes           No
             |             |
       Recommend the   Do we buy, build, or
       existing solution.      both?
```

## What's Next?

The Global Gems L&D team evaluated results from the **impact opportunity interview** and determined that learning can support the business goal. They have prepared a summary with recommendations for the business goal owner. The next section illustrates their findings and their proposal for the learning solution in an **impact blueprint**.

# Case Study 2: Impact Blueprint

## Background

Global Gems is seeing a decline in sales and has a growth goal of 30%. The strategy for growth includes contribution from cross-functional teams, including marketing, technology, human resources, products, and facilities. Gem care specialists are the primary source of sales growth and are essential for achieving business and performance goals.

Customer satisfaction scores, comments on the website, and consumer websites show customers are not having positive in-store experiences. There are four capabilities critical for sales success: product knowledge, intentional engagement, managed persuasion, and luxury care. Gem care specialists are strong in product knowledge and have opportunities for improvement in intentional engagement, managed persuasion, and luxury care based on customer satisfaction scores.

## Impact Opportunity

Findings from the impact opportunity interview reveal that L&D can contribute to the growth goal by providing learning solutions focused on customer experience. Learning solutions will strengthen gem care specialists' performance in intentional engagement, managed persuasion, and luxury care and leverage their current expertise in product knowledge. Solutions include a mix of training and performance support. Pilot-testing in Africa is recommended before global launch. Piloting allows for evaluation of the solutions' effectiveness and impact before launch to other markets.

## Business Goal Alignment

Support 30% growth goal by empowering gem care specialists with capability that drives sales through optimal in-store customer experience.

## Performance Targets

| Capability | Performance Requirement | Performance Measure (Customer Satisfaction Target Score) |
|---|---|---|
| Intentional engagement | Actively listen to customers, and interpret non-verbal clues. | 5 |
| Managed persuasion | Assess interest, evaluate doubts, address concerns, and drive desire. | 5 |
| Luxury care | Create a personalized and luxurious in-store experience. | 5 |

## Impact Measures and KPIs

Business Performance and People Performance Measures

| Measure/KPI | Measure Type | Goal | Report Timing |
|---|---|---|---|
| Quarterly sales | Business | 20% growth | End of year |
| Customer satisfaction scores | People | 5 points | End of year |
| Employee engagement scores* | Business | 80% Agree/ Strongly Agree | Beginning of next year |

*\* Results for "The company invests in development that helps me succeed in my role," and "I believe in the company's future."*

## Data Owners and Partners

| Data | Owner/Partner |
|---|---|
| Quarterly sales | Marisol Ozinga |
| Customer satisfaction | David Lenox |
| Employee engagement | Maxine Ng |
| Data science and reporting | Jafari Adebayo |

## Learning Performance Measures

| Measure/KPI | Goal |
|---|---|
| Performance impact* | 80% top 2 boxes |
| Employee-manager engagement* | 90% Yes |
| Business goal alignment* | 90% Yes |
| Frequency of use* | 80% top 2 boxes |
| Business simulation average score | 85% mastery |

*\*Post-program and 30-day follow up learning surveys*

## L&D Contribution to Goal

Based on consultation and agreement with other cross-functional partners, L&D estimated contribution to goal is 15%.
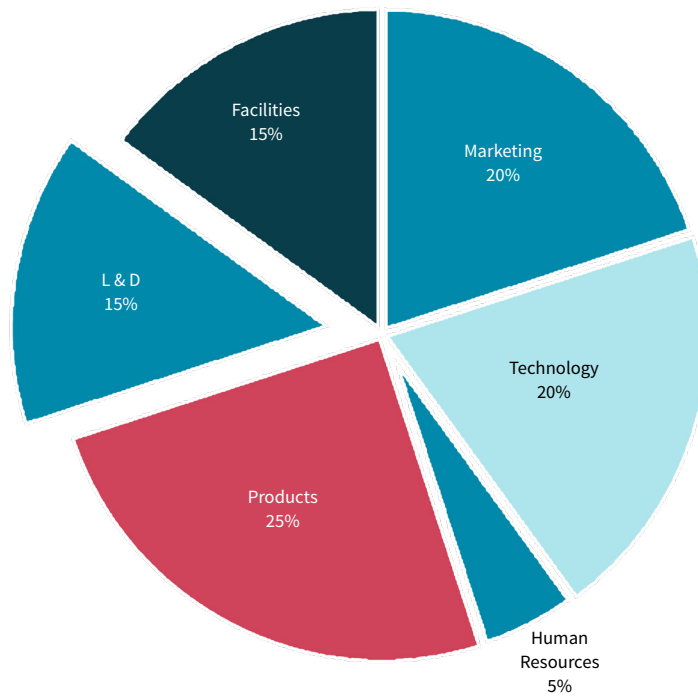


## Impact Blueprint Sign-Off

*Mustafa Nysem*

Mustafa Nysem
Director of Global Sales

*Tamara Devereaux*

Tamara Devereaux
Chief Learning Officer

## 🖉 What's Next?

The Global Gems L&D team has achieved agreement to move forward with the impact blueprint. They are aligned with the business goal owner on performance targets, outcomes, measures for impact, and timing for results. The next section illustrates impact design for the learning solutions.

## Learning Solutions

- Virtual classroom training programs.
- Digital business simulation.
- Mobile-enabled performance support, including videos, podcasts, and interactive PDFs.
- Leadership videos explaining the business goal and alignment with learning solutions.
- Discussion guides for managers and employees.
- Coaching guides for managers.
- Learning support discussion groups.

## What Do We Accomplish with the Impact Blueprint?

- Confirmation that L&D can contribute to the business goal.
- Proactive impact planning.
- Alignment with the business goal and specific targets for performance.
- Measures and KPIs for impact.
- Agreement for impact with the business goal owner.
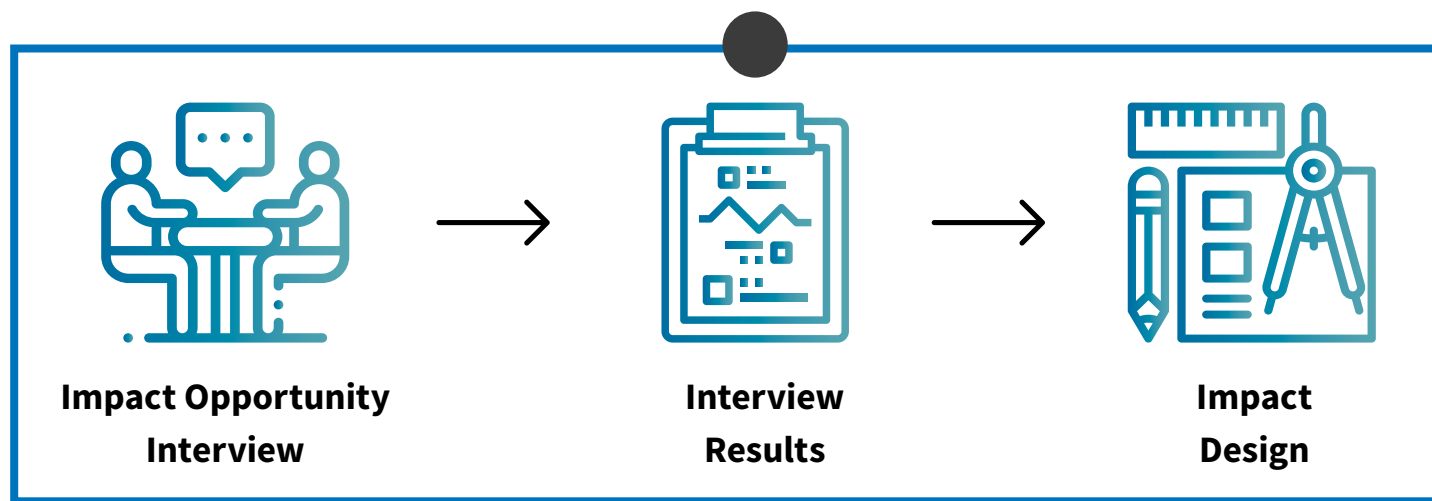
# Impact Design

> *"Impact begins with instructional design that activates performance."*

How do we activate performance with learning experiences? Can we leverage and make actionable what we discovered from the impact opportunity interview? What are the design implications?

Impact is intentional. There are instructional design techniques that prompt behavior, motivate actions, and influence performance that achieves the business goal. Elements of impact must be built into instructional design.

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.

| Impact Opportunity Interview | → | Interview Results | → | Impact Design |
|---|---|---|---|---|

## What are the Benefits for Impact Design?

- Impact embedded in the learning experience with instructional design.

- Content aligned with the business goal.

- Messaging and communication in support of learning's intention and purpose for impact.

- Specific targets for performance impact.

- Measurable results for instructional design effectiveness.

0017

| 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 alignmenzt 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?** |
|--------------|------------------------------------------|

**How will you collaborate with cross-functional partners who also support the business goal?**

- 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?** |
|-----------|----------------------------------|

**What are the design considerations for the target audience?**

- 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?** |
|------------|--------------------------------------------|

**How will you connect learning outcomes with performance targets?**

- 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? |
|---|---|

How will you address the need to move performance from where it is to where it needs to be?

- 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? |
|---|---|

What strategies will you use to activate performance influences within L&D's control?

- Identify drivers where learning or performance support can impact performance outcomes.
- Create supplemental solutions to activate performance.

| Calculation | What are the measures and KPIs? |
|---|---|

How will you consider data for learning performance, employee performance, and business performance?

- 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? |
|---|---|

How will you address threats to performance?

- Identify potential performance blockers.
- Address as needed in the learning solution.

# Case Study 3: Impact Design for Global Gems Learning Solution

| Core | What is the business goal? |
|------|----------------------------|

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

- Create videos from Aliah Sandeep, chief executive officer, and Mustafa Nysem, director of global sales, explaining how training will help achieve the business goal.
- Include messaging in program description that explains how learning is connected to the business goal.
- Create facilitator script that details alignment between the business goal and learning.
- Illustrate through examples and role-plays what happens when employees use behaviors and performance that help achieve 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?**

- Create scenarios and simulations in the learning experience that replicate current business conditions.
- Illustrate the impact of targeted performance outcomes on current business conditions.

| Contribution | Who is supporting the business goal? |
|--------------|--------------------------------------|

**How will you collaborate with cross-functional partners who also support the business goal?**

- Leverage mobile point-of-sale technology for digital business simulations.
- Align with marketing on new branding strategy.
- Describe cross-functional contribution to business goals in the learning experience.

| Community | Whose performance is needed? |
|-----------|------------------------------|

**What are design considerations for the target audience?**

- Pilot training program and learning solutions with gem care specialists in Africa stores.
- Localize language in learning solutions.
- Consult with gem care specialists in Africa for input on cultural considerations.
- Identify gem care specialist content partners in Africa for content development, employee perspective, and relevance.

| Capability | What are the performance requirements? |
|------------|----------------------------------------|

**How will you connect learning outcomes with performance targets?**

| Performance Target | Performance Outcome |
|--------------------|---------------------|
| Intentional engagement | Actively listen to customers, and interpret non-verbal clues. |
| Managed persuasion | Assess interest, evaluate doubts, address concerns, and drive desire. |
| Luxury care | Create a personalized and luxurious in-store experience. |

- Illustrate what behaviors and performance look like with videos and role-plays.

- Provide examples of what happens when behaviors and performance are utilized effectively

0021

| Comparison | What is the performance difference? |
|---|---|

How will you address the need to move performance from where it is to where it needs to be?

- Describe consequences when performance required to achieve the business goal is not used.
- Illustrate examples of customer experience when performance required to achieve the business goal is not used.
- Compare and contrast desired behaviors and performance with behaviors and performance that threaten the business goal.

| Capability | Current | Required |
|---|---|---|
| Intentional engagement | 2 | 5 |
| Managed persuasion | 3 | 5 |
| Luxury care | 3 | 5 |

| Causation | What are the performance drivers? |
|---|---|

What strategies will you use to activate performance influences within L&D's control?

- Create pre-program discussion guides for managers and employees to set expectations.
- Create post-training discussion guides for managers and employees to create accountability for applying learning on the job.
- Create a coaching guide for store managers.
- Design post-training program performance support with simulations, videos, podcasts, and discussion groups.
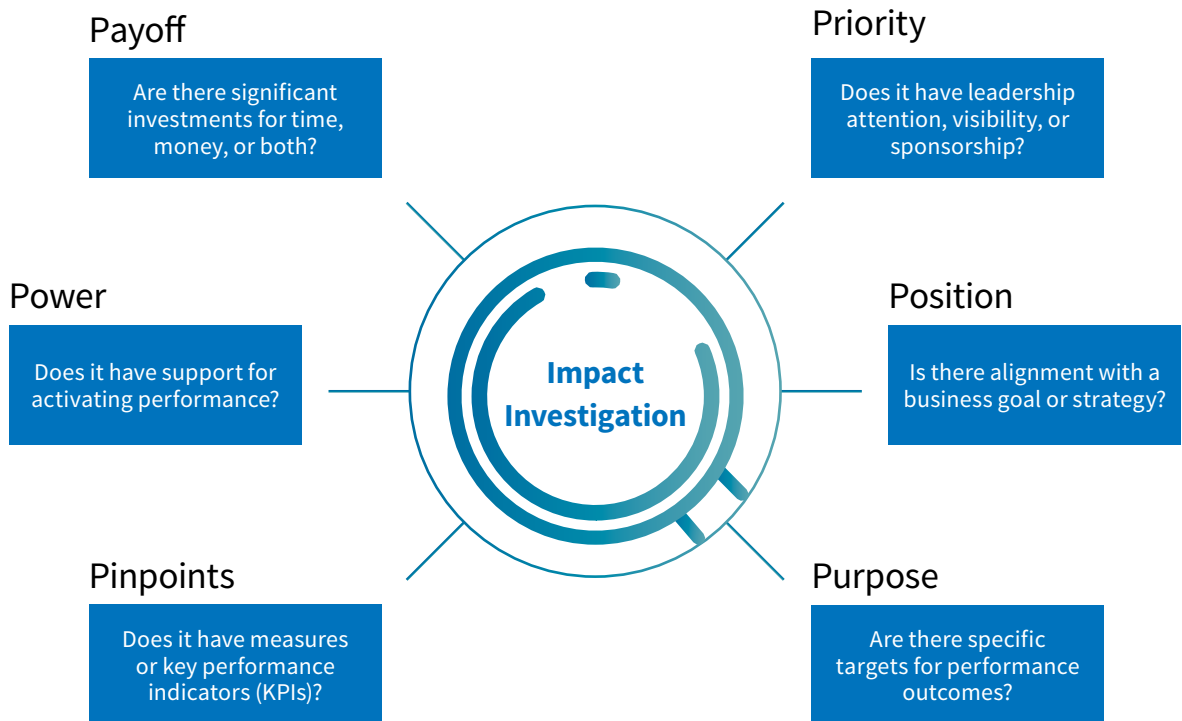
| Calculation | **What are the measures and KPIs?** |
|---|---|

How will you consider data for learning performance, employee performance, and business performance?

- Illustrate the employee and business performance measures targeted for impact.
- Measure learning effectiveness with learning surveys.
- Measure employee knowledge acquisition with business simulation scores.

| Caution | What are the risks? |
|---|---|

How will you address threats to performance?

- Using videos and role-plays, include examples of success and impact on the business goal when learning is applied to address employee engagement scores for low confidence in the future of the business.

# Case Study 4: Global Gems Learning Solution – Ready for Impact or Not?

The Global Gems L&D team did a great job with the impact opportunity investigation, impact blueprint, and impact design. But does the solution meet the standards for an impact investigation?

### Payoff
Are there significant investments for time, money, or both?

### Priority
Does it have leadership attention, visibility, or sponsorship?

### Power
Does it have support for activating performance?

**Impact Investigation**

### Position
Is there alignment with a business goal or strategy?

### Pinpoints
Does it have measures or key performance indicators (KPIs)?

### Purpose
Are there specific targets for performance outcomes?

| Investigate | | Yes | No | Evidence |
|---|---|---|---|---|
| Priority | Does it have leadership attention, visibility, or sponsorship? | | | Leadership videos describing connection between learning solutions and the business goal. |
| Position | Is it aligned with a business goal or strategy? | | | Learning solutions with targets for behaviors and performance that support 30% growth goal. |
| Purpose | Are there specific targets for performance outcomes? | | | Performance for intentional engagement, managed persuasion, and luxury care. |
| Pinpoints | Does it have measures or key performance indicators (KPIs)? | | | Quarterly sales, customer satisfaction scores, and employee engagement scores. |
| Power | Does it have support for activating performance? | | | Manager-employee discussion guides, coaching guides, videos, podcasts, business simulation, and interactive PDFs. |
| Payoff | Are there significant investments for time or money? | | | Costs for video production and costs for vendor digital learning solutions. |

# The L&D Detective Says…

Have you noticed that, up to this point, I have heavily focused on planning for impact? The third L&D detective guiding principle is, "If you don't plan for impact in the beginning, it will be difficult to measure in the end." This is where I see L&D teams struggle the most. There is no plan for impact, so it is difficult to measure.

Impact is a mindset, and it is intentional. The traditional view of L&D is that the course or training event we create is the deliverable. However, I believe impact is the deliverable.

*"I have found the bulk of time spent investigating impact is planning for impact."*

By sharing my L&D detective techniques for proactive impact planning and design, I hope you are better prepared to measure the results of your learning solutions. I have found the bulk of time spent investigating impact is planning for impact. It is time well spent, and lays the foundation for successful impact measurement and investigation.

## What's Next?

We have seen how results of an impact opportunity interview align learning with the business goal, sets targets for performance, and determines measures for impact. We've also seen how results from the interview are used for impact design. In the next section, we will discover how a learning impact survey uncovers clues for learning effectiveness.

# Learning Impact Survey

What kind of clues for impact do you get from post-training surveys? Can you estimate the impact of learning with survey results? What makes survey data actionable versus nice to have?

A learning impact survey measures learning effectiveness and predicts impact. Clues from these surveys may not necessarily represent actual impact, but they are a good preliminary indication of expected outcomes and results. You also get clues regarding learning effectiveness and feedback on instructional design. The clues you get from a learning impact survey help answer questions such as:

- How much of what people learned can we expect will be used on the job?
- Is the connection between performance and achieving the business goal clear?
- Are there barriers inhibiting people from using what they learned?

Unlike traditional surveys that ask whether participants liked the instructor, the facilities, or enjoyed the experience, learning impact surveys estimate performance activation.

## Learning Impact Survey Questions

### Performance Impact

| | |
|---|---|
| Ask | How much do you believe this learning experience will impact your performance? |

| | |
|---|---|
| None at all | A lot |
| A little | A great deal |
| A moderate amount | |

| | |
|---|---|
| Intention | Measure belief in the learning experience's ability to activate performance. |
| Investigate | Does the learning experience illustrate real-world examples of using what was learned and inspire motivation to apply what was learned on the job? |

## Applied Learning

| | |
|---|---|
| Ask | How much of what you learned do you believe you will use? |

|  |  |
|---|---|
| None at all | A lot |
| A little | A great deal |
| A moderate amount | |

| | |
|---|---|
| Intention | Measure expected amount of activated learning. |
| Investigate | Does the learning experience illustrate results for activating performance on a scale of low to high use, including success factors and how to address potential performance barriers? |

## Business Goal Alignment

| | |
|---|---|
| Ask | Do you see the connection between using what you learned and achieving the business goal? |

Yes

No

Not sure

| | |
|---|---|
| Intention | Measure agreement and clarity on how activated performance helps achieve the business goal. |
| Investigate | Is the connection between learning and achieving the business goal described in messaging, communication, and examples throughout the learning experience? |

## Performance Readiness

| | |
|---|---|
| Ask | Were there enough opportunities for interaction, activities, and practice for you to feel confident applying what you learned? |

Yes

No

Not sure

| | |
|---|---|
| Intention | Measure belief in ability to use what was learned on the job. |
| Investigate | Does the learning experience include real-world examples using role-play, feedback, and reinforcements that support performance readiness? |

## Employee-manager Engagement

| | |
|---|---|
| Ask | Did you and your manager discuss expectations for this learning experience? |

Yes

No

| | |
|---|---|
| Intention | Measure manager-employee engagement. |
| Investigate | Are there resources to support discussion between managers and employees about learning goals and expected performance outcomes? |

## Usefulness

Ask                 How will this learning experience help your performance?

  Comment:

Intention           Compare responses with intended performance outcomes. Evaluate unanticipated outcomes.

Investigate         Recurring themes from responses.

## Learning Blockers

Ask                 Is there anything about the learning experience that was not helpful?

  Comment:

Intention           Evaluate opportunity to improve the learning experience.

Investigate         Recurring themes from responses.

## 30-Day Follow-Up Learning Impact Survey Questions

### Performance Impact

| | |
|---|---|
| Ask | How much was your performance impacted by the learning experience? |

| | |
|---|---|
| None at all | A lot |
| A little | A great deal |
| A moderate amount | |

| | |
|---|---|
| Intention | Measure performance impact on the job. |
| Investigate | What activated or blocked performance? Is there a difference between the expected impact after the program and after 30 days? (if the performance impact survey question was included in the first survey) |

### Applied Learning

| | |
|---|---|
| Ask | How much of what you learned have you used? |

| | |
|---|---|
| None at all | A lot |
| A little | A great deal |
| A moderate amount | |

| | |
|---|---|
| Intention | Measure expected amount of activated learning. |
| Investigate | What supported or motivated performance? What acted as a barrier to learning application on the job? Is there a difference between the expected amount of use after the program and after 30 days? (if the applied learning survey question was included in the first survey) |

### Frequency of Use

| | |
|---|---|
| Ask | How often have you used what you learned? |

| | |
|---|---|
| None at all | A lot |
| A little | A great deal |
| A moderate amount | |

| | |
|---|---|
| Intention | Measure regularity of using what was learned. |
| Investigate | Are employees motivated to activate performance that achieves the business goal? Is there anything that blocks utilization of learning? |

## Employee-manager Engagement

Ask                 Did you and your manager discuss how you will use what you learned?

                        Yes

                        No

Intention           Measure manager-employee engagement.

Investigate         Is there support for setting expectations and accountability with managers and employees for using what
                    was learned? Do employees and managers have resources for activating performance?

## Business Goal Alignment

Ask                 Do you see the connection between using what you learned and achieving the business goal?

                        Yes

                        No

                        Not Sure

Intention           Measure agreement and clarity on how performance helps achieve the business goal.

Investigate         Is the business goal clear, realistic, and still relevant? Are there updates on progress for achieving the goal?

## Use Case

Ask                 Please share an example of how you have used what you learned.

                      Comment:

Intention           Identify success stories for activated performance.

Investigate         Recurring themes from responses.

## Performance Blockers

Ask                 If you have not used what you learned, please share why.

                      Comment:

Intention           Evaluate performance blockers and address potential risks to achieving the business goal.

Investigate         Recurring themes from responses.

## What Do Clues from Impact Learning Surveys Tell Us?

A single data point from one survey question alone does not tell the whole story, but – in combination with other survey questions – we gain actionable clues for learning effectiveness and estimated impact. Here are some examples of stories you can tell with learning impact survey data:

- Employees who see connection between performance and achieving the business goal plan on using significant amounts of what they learned.
- When we include role-plays and simulations in training, people have greater confidence in their ability to apply what they learned on the job.
- There is strong agreement that training will improve performance but not significantly.
- Employees who believe the learning solution will minimally impact their performance believe the biggest barriers to achieving goals are time and technology.

### *"Survey data gives good signals for impact and is not where the story ends."*

Learning survey data is the first link in the chain of evidence for impact. Survey data gives good signals for impact and is not where the story ends. There are more facts, clues, evidence, and data that lead to answering the question, "What is the impact of learning?"



## What's Next?

The Global Gems L&D team has decided which learning survey questions they will use. They chose brevity to maximize the opportunity for higher survey response rates with focuses on performance impact, business goal alignment, manager-employee engagement, and frequency of use. The next section details the survey questions they chose.

# Case Study 5: Learning Impact Survey for Global Gems

1. How much do you believe this learning experience will impact your performance?

   None at all                     A lot

   A little                        A great deal

   A moderate amount

   Comment:

2. Did you and your manager discuss expectations for this learning experience?

   Yes

   No

   Comment:

3. Do you see the connection between using what you learned and achieving the business goal?

   Yes

   No

   Not sure

   Comment:

4. How will this learning experience help your performance?

   Comment:

5. Is there anything about the learning experience that was not helpful?

   Comment:

0031

## 30-Day Follow-Up

1.  How much was your performance impacted by the learning experience?

    None at all                          A lot

    A little                             A great deal

    A moderate amount

    Comment:

2.  Did you and your manager discuss how you will use what you learned?

    Yes

    No

    Comment:

3.  How often have you used what you learned?

    Never                                Usually

    Rarely                               Always

    Sometimes

    Comment:

4.  Please share an example of how you have used what you learned.

    Comment:

5.  If you have not used what you learned, please share why.

    Comment:

# The L&D Detective Says…

How can learning survey data be actionable rather than data we simply collect, evaluate, and toss in the pile? I am glad you asked. Each question in the learning impact survey has an intended purpose and an action to investigate.

Do you have to include every question in your survey? Not necessarily. However, I believe you should include as many questions necessary to answer your questions regarding the effectiveness of your learning solution.

*"Employees not responding to learning surveys is a complaint I hear often."*

What good is a learning survey if you cannot get a good response, right? Employees not responding to learning surveys is a complaint I hear often. It is a major challenge for many L&D teams. Here are my suggestions for improving survey response rates:

Send request for feedback from a person versus a system.

Set aside time for the survey during the program.

Share survey results with attendees and actions to be taken based on feedback.

Shorten survey completion time with fewer questions.

Send the survey link by chat with web-based/virtual programs.

## What's Next?

The best part of being an L&D detective is solving impact measurement mysteries. In the next section, our L&D detective work focuses on building the case for impact. We will examine facts, clues, evidence, and data that answer the question, "What is the impact of learning?"

# Facts, Clues, Evidence, and Data for Impact

> *"When you follow facts, clues, evidence, and data that demonstrate results, you discover answers to questions about impact."*

We have done a lot of work planning and preparing for impact. Results from the impact opportunity interview support proactive impact planning and builds the impact blueprint. Impact design activates performance and impact learning surveys estimate learning effectiveness. The next phase of L&D detective work examines facts, clues, evidence, and data that demonstrate impact.

There are three evidence types that reveal impact: learning performance, people performance, and business performance. This evidence will demonstrate how training activates employee performance and how performance activation drives the business goal. When you follow facts, clues, evidence, and data that demonstrate results, you discover answers to questions about impact.



Learning Performance + People Performance + Business Performance = Impact
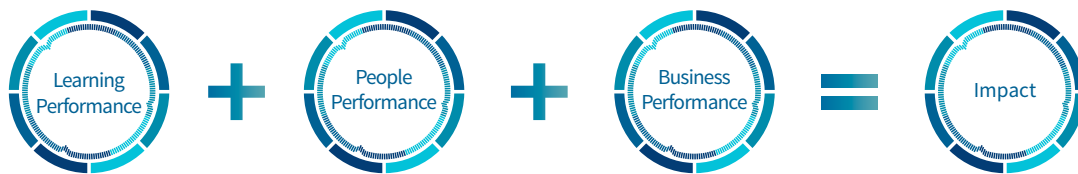
## Learning Performance

The first link in the chain of evidence for the impact investigation is learning performance. Learning surveys, test and assessment scores, knowledge checks, simulation scores, and results from focus groups or one-on-one interviews provide clues about learning effectiveness. These are examples of clues and data we will use to build the case for learning's impact.

## Employee Performance

The second link in the chain of evidence for impact is employee performance. This data shows the extent to which we can attribute behaviors and actions applied on the job to learning effectiveness. Employee performance data are indicators for activated behaviors and actions.

## Business Performance

The third link in the chain of evidence for impact is business performance. This is where we connect the dots between learning effectiveness, activated performance, and business outcomes. Business performance data are where we finally reveal the answer to the question, "What is the impact of learning?"

## 🖊 What's Next?

The Global Gems L&D team is ready to examine facts, clues, evidence, and data for impact. They have results for learning performance, people performance, and business performance. The next section shows the results and their findings.

# Case Study 6: Impact Investigation for Global Gems

The Global Gems L&D team designed and piloted the Gem Care learning solutions in Africa stores. They are piloting programs to compare business performance and people performance for stores in Africa to stores in other countries in the same business quarters. They will investigate differences between agreed-upon impact measures from the impact blueprint for the pilot stores and stores in other countries as evidence for impact.

## Impact Measures & KPIs

Business Performance and People Performance Measures

| Measure/KPI | Measure Type | Goal | Report Timing |
|---|---|---|---|
| Quarterly sales | Business | 20% growth | End of year |
| Customer satisfaction scores | People | 5 points | End of year |
| Employee engagement scores* | Business | 80% Agree/Strongly Agree | Beginning of next year |

*Results for "The company invests in development that helps me be successful in my role.", and "I believe in the company's future".

Note: Pilot programs were launched in Africa at the beginning of Q2.

Learning Performance Measures

| Measure/KPI | Goal |
|---|---|
| Performance impact* | 80% top 2 boxes |
| Employee-manager engagement* | 90% Yes |
| Business goal alignment* | 90% Yes |
| Frequency of use* | 80% top 2 boxes |
| Business simulation average score | 85% mastery |

*Post-program and 30-day follow up learning surveys

## Learning Performance: Learning Impact Survey Results

The following results are learning survey data for the virtual instructor-led training programs, immediately following the programs and 30 days after.

# Performance Impact

■ A lot/A great deal   ■ A moderate amount   ■ None at all/A little          Goal = 80%

**How much do you believe this learning experience will impact your performance?**

76%

15%

9%

Goal = 80%

86%

**How much was your performance impacted by the learning experience?**

8%

6%
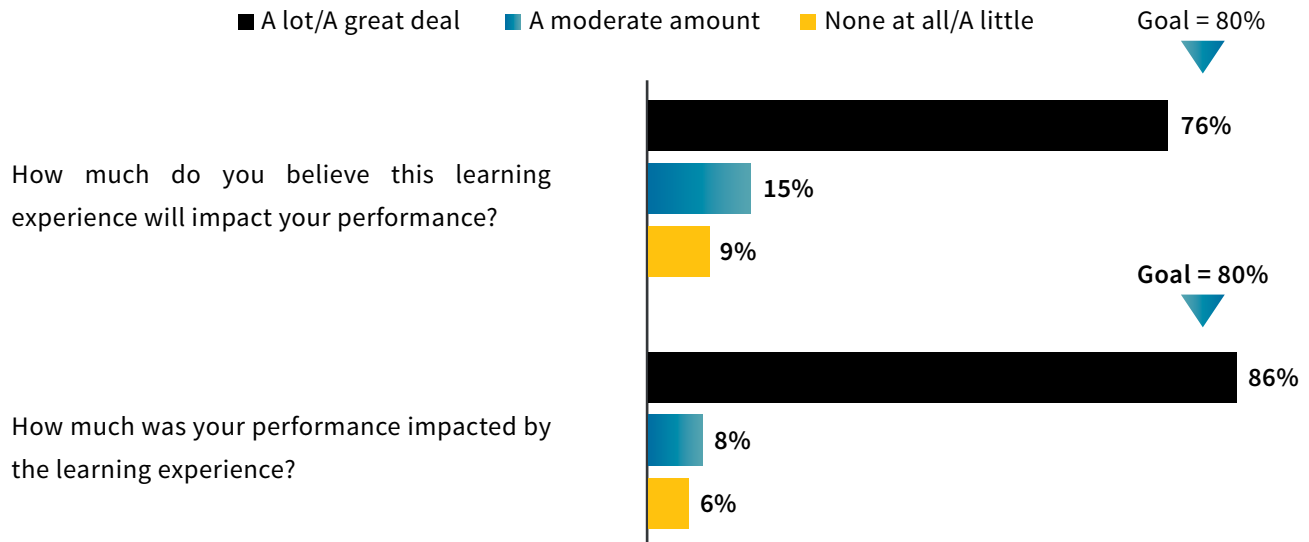
## Observations and Actions

- Results for performance impact were 4% below goal immediately after the program.

- Results for performance impact were 6% above goal 30 days after the program.

- Employees saw higher impact for learning on the job than they initially anticipated after the program.

- Survey comments indicate the business simulation employees were required to complete after the virtual classroom program reinforced what was learned and helped build confidence.

- Action to be taken: Redesign role-plays in the virtual classroom training for greater confidence building.

## Top 2 and Bottom 2 Box Scores

Global Gems used a method called top 2 box and bottom 2 box scores for performance impact and frequency of use survey results. Here is how it works:

| Strongly disagree | Disagree | Not sure | Agree | Strongly Agree |
|---|---|---|---|---|
| 5% | 10% | 10% | 50% | 25% |

- Top 2 boxes = Agree (50%) + Strongly agree (25%) = 75%

- Bottom 2 boxes = Disagree (10%) + Strongly disagree (5%) = 15%

# Top 2 Boxes, Bottom 2 Boxes Example

| 15% | 10% | 75% |
|-----|-----|-----|
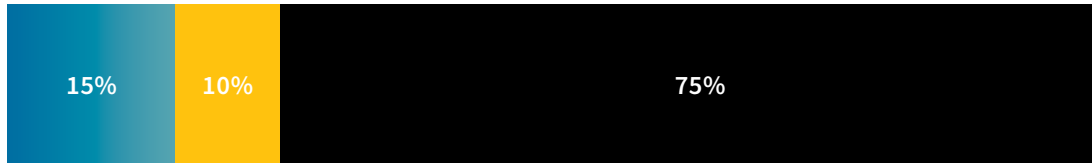
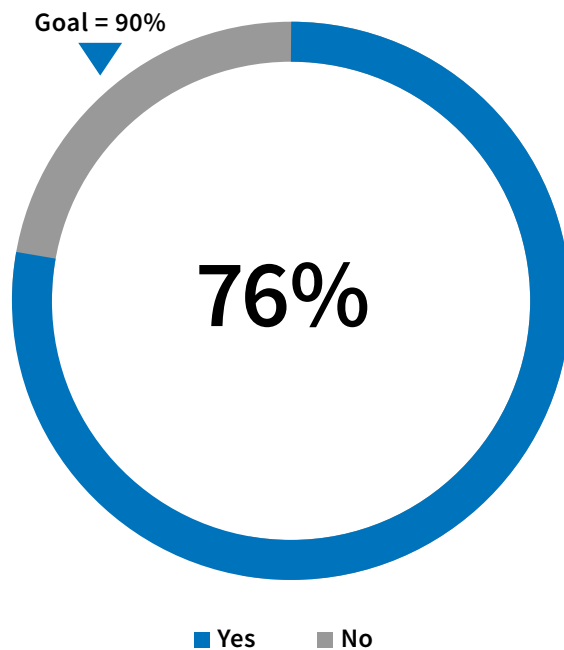■ **Strongly Disagree/Disagree**　　■ **Not sure**　　■ **Agree/Strongly Agree**

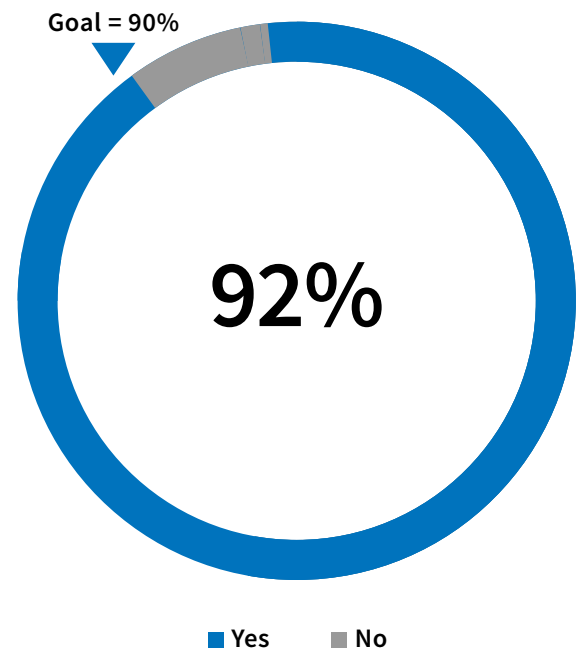Why use top 2 boxes, bottom 2 boxes?

- Better data visualization.

- Simplify results for analysis.

- Compare data points faster.

# Employee - Manager Engagement

Did you and your manager discuss expectations for this learning experience?

Goal = 90%

**76%**

■ **Yes**　　■ **No**

Did you and your manager discuss how you will use what you learned?

Goal = 90%

**92%**

■ **Yes**　　■ **No**

## Observations and Actions

- Results for employee-manager engagement pre-program were below goal by 14%.

- Results for employee-manager engagement post-program exceeded goal by 2%.

- More employees and managers engaged after the program than they did before the program.

- Survey comments indicate that managers and employees had to go to the learning management system (LMS) to get pre-program discussion guides and were sent the post-program discussion guides directly via email.

- Action to be taken: Send pre-program discussion guides directly to employees and managers via email.

# Business Alignment

**Do you see the connection between using what you learned and achieving the business goal?**

Goal = 90%

**91%**

■ Yes    ■ No    ■ Not sure
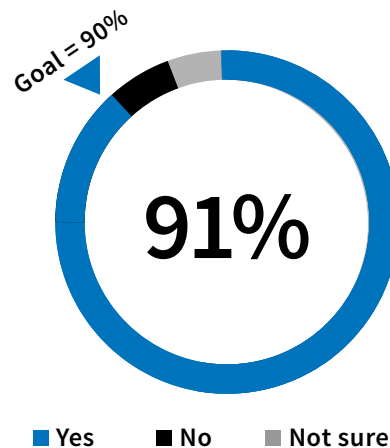
## Observations and Actions

- Results for business alignment exceeded goal by 1%.

- Employees see connection between using what they learned and achieving the business goal.

- Survey comments indicate leadership videos in the program announcement, leadership videos in the training program, and messaging in the program description reinforced alignment between learning and the business goal.

- Action to be taken: Use the same method for communicating business alignment with other programs.

# Frequency of Use

Goal = 80%

| 6% | 5% | 89% |

■ Never/Rarely    ■ Sometimes    ■ Usually/Always
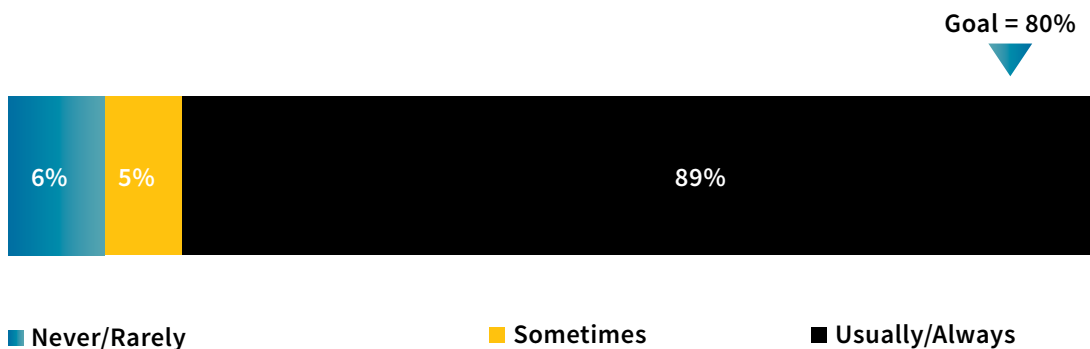
## Observations and Actions

- Results for frequency of use exceeded goal by 9%.

- Employees believe they are using a substantial amount of what they learned.

- Survey comments indicate accountability planning between managers and employees in the post-program planning guide and check-

  ins with managers play a significant role in application of learning on the job.

- Action to be taken: Create accountability planning guide template for other programs.

## Learning Performance: Business Simulation Results

# Gem Care Business Simulation

### Average Score

**Goal = 85%**

**89%**
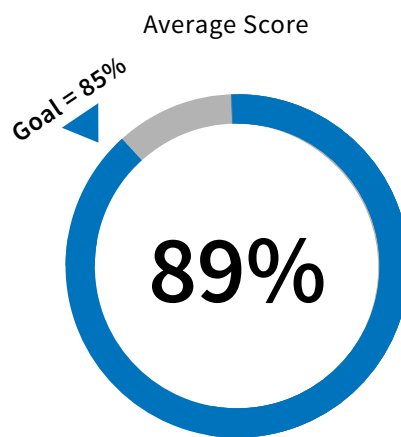
## Observations and Actions

- Employees exceeded the mastery target average score by 4%.

- Data from the business simulation shows that 91% of employees selected correct answers on first attempt for the luxury care and

  intentional engagement modules compared to 80% selecting the correct response on first attempt for the managed persuasion module.

- Action to be taken: Reinforce recommendations in post-program communication and business simulation instructions for watching

  the managed persuasion performance support videos before starting the simulation.

## Impact Investigation Findings for Learning Performance

- Post-program accountability planning reinforces employees using what they learned.

- Higher engagement between employees and managers activates performance.

- Opportunities to practice behaviors and skills builds confidence.

- Direct messaging from leadership reinforces alignment between using what was learned and achieving business goals.

- Ease of access to performance support increases utilization.
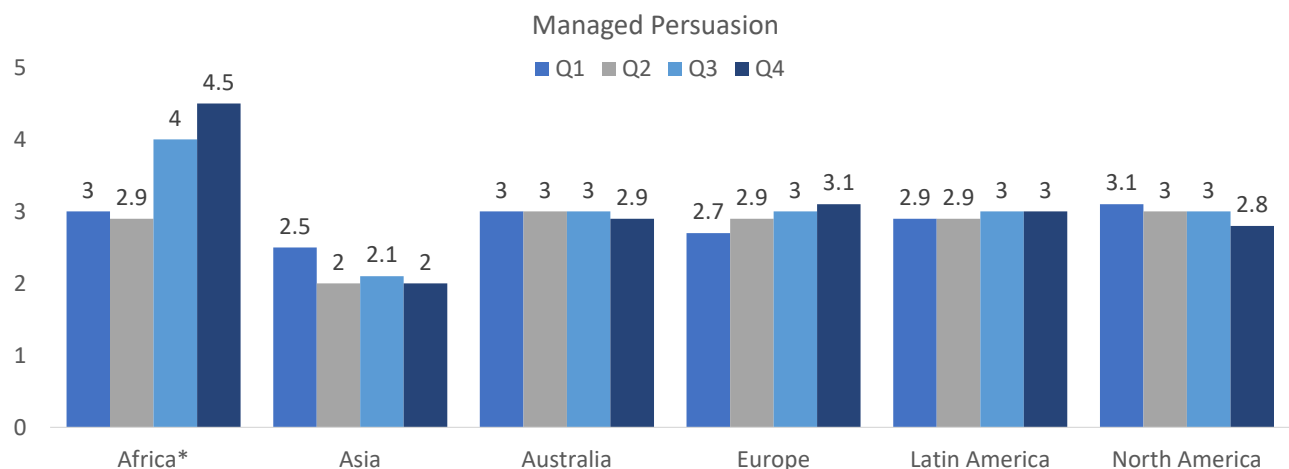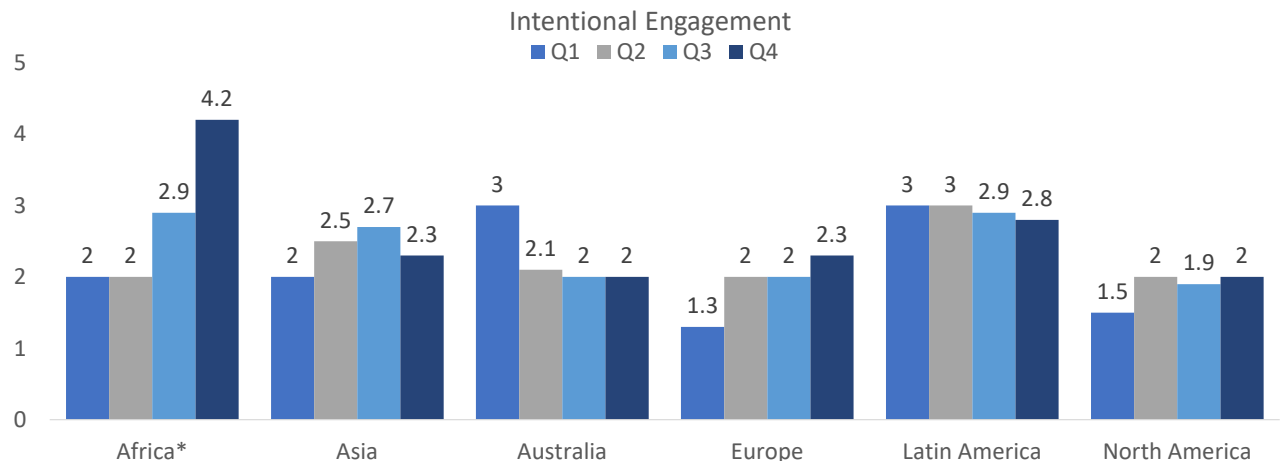
## People Performance

Gem Care customer satisfaction scores measure customers' experience with Gem care specialists. There are three performance targets for Gem Care training programs and learning solutions:
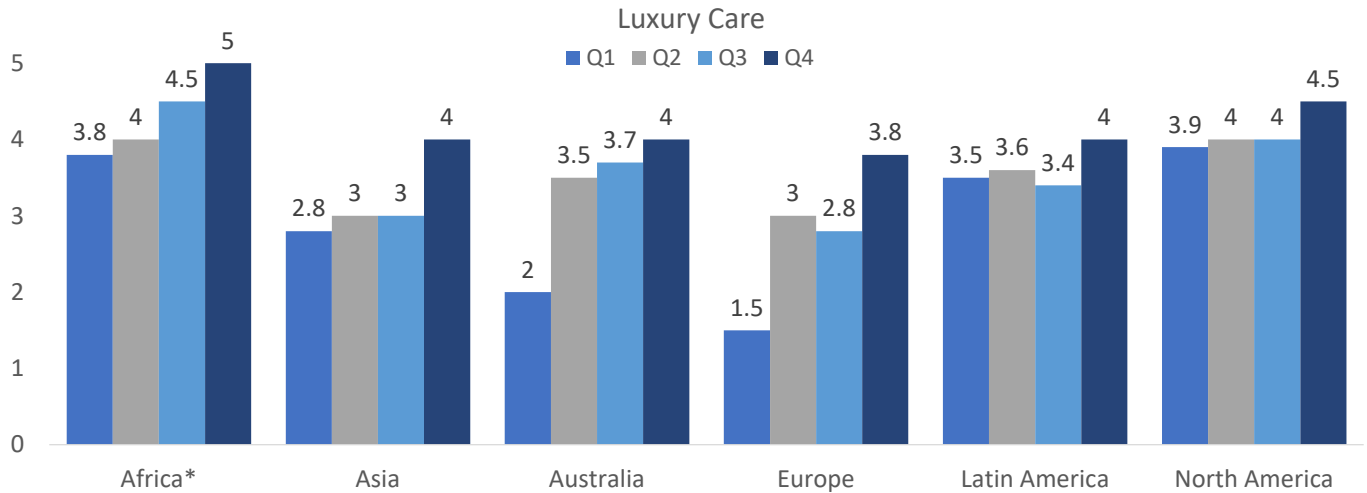
| Capability | Performance Requirement | Performance Measure (Customer Satisfaction Target Score) |
|---|---|---|
| Intentional engagement | Actively listen to customers, and interpret non-verbal clues. | 5 |
| Managed persuasion | Assess interest, evaluate doubts, address concerns, and drive desire. | 5 |
| Luxury care | Create a personalized and luxurious in-store experience. | 5 |

The impact investigation compares customer satisfaction scores quarter to quarter for Africa, the pilot country, to other countries. The training programs were piloted in Africa in the second quarter.

# Customer Satisfaction

### Intentional Engagement
■ Q1  ■ Q2  ■ Q3  ■ Q4



### Managed Persuasion
■ Q1  ■ Q2  ■ Q3  ■ Q4

## Customer Satisfaction

### Luxury Care

■ Q1  ■ Q2  ■ Q3  ■ Q4



**Impact Investigation Findings for People Performance**

- Customer satisfaction scores indicate pilot stores in Africa are closer to achieving the target score (5) than stores without Gem Care training programs and learning solutions.

- Scores for intentional engagement, managed persuasion, and luxury care rose consistently quarter to quarter in Africa.

- Europe saw an increase in the score for intentional engagement in the fourth quarter but at a much lower rate compared to Africa.

- Europe saw slight increases in scores quarter to quarter for managed persuasion.

- Africa achieved the target score (5) for luxury care in the fourth quarter.

- All stores saw an increase in the fourth quarter for luxury care.

*Note: Remodeling was completed in all stores in Q4 and contributed to customer in-store experience.*

**Business Performance**

The following data shows sales results across stores. The impact investigation compares quarter to quarter sales for the pilot country, Africa, to other countries. The training programs were piloted in Africa in the second quarter.

## Quarterly Sales
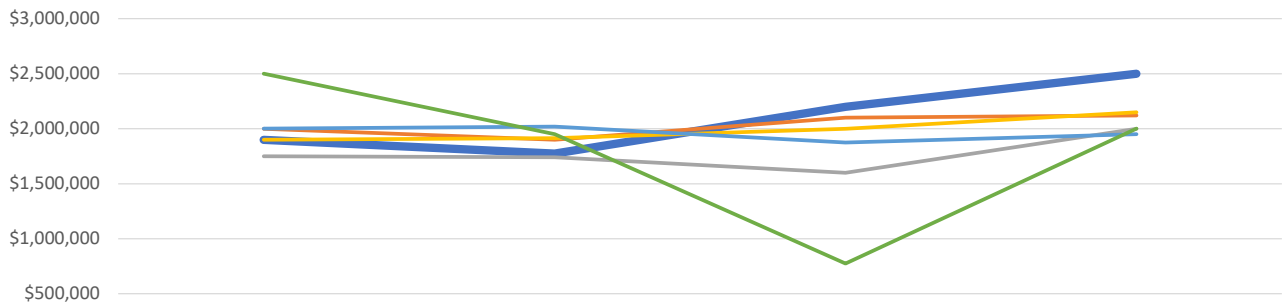


| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Africa* | $1,900,000 | $1,775,000 | $2,200,000 | $2,500,000 |
| Asia | $2,000,000 | $1,900,000 | $2,100,000 | $2,120,000 |
| Australia | $1,750,000 | $1,740,000 | $1,600,000 | $2,000,000 |
| Europe | $1,900,000 | $1,915,000 | $2,000,000 | $2,150,000 |
| Latin America | $2,001,000 | $2,020,000 | $1,875,000 | $1,950,000 |
| North America | $2,500,000 | $1,950,000 | $775,000 | $2,001,000 |

*Stores where training and learning solutions for Gem Care were piloted.*

## Impact Investigation Findings for Business Performance

- Africa exceeded the 30% growth goal.

- Africa achieved 32% growth by end of year (comparing first quarter to fourth quarter).

- Sales increased consistently from second quarter to third quarter and third quarter to fourth quarter in Africa.

- Sales in other countries remained consistent with slight increases and decreases excluding North America in the third quarter.

- All stores saw an increase in sales in the fourth quarter due to seasonal holiday sales trends.

*Note: One of the stores in North America closed for remodeling after fire damage in Q3.*

## Tell the Whole Story

Training and learning are just two of many influences that activate performance. It is important to keep this top of mind as you examine facts, clues, evidence, and data for impact. Why? We cannot make false assumptions that changes in behavior, performance, and actions or achieving the business goal only occur as a result of training.

We cannot conduct a thorough impact investigation without considering all factors that contribute to performance and achieving the business goal. We need to examine all dynamics within the timeframe in which we expect to see impact. Here are some examples:

- There was a product promotion that gave sales a lift.

- A new service from a competitor impacted demand for ours.

- There was a weather condition that prevented people from getting to stores.

- We had to shift supply-chain strategy unexpectedly.

- There was higher demand for a product due to unforeseen environmental factors.

None of these dynamics have anything to do with training, but they do impact results. Impact investigation is not just about examining what happened as a result of learning. L&D detective work examines all the facts, clues, evidence, and data that reveal reasons for impact.

# Impact Investigation Results

Did training activate performance? Did activated performance help achieve the business goal? Here is a summary of the impact investigation findings:

## Pilot stores in Africa exceeded growth goal by 2%

### +32%

Africa achieved 32% growth from Q1 to Q4.

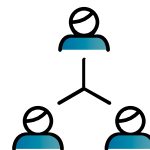Sales in other countries remained consistent with slight increases and decreases. *

Customer satisfaction scores in Africa for intentional engagement, managed persuasion, and luxury care increased in Africa after training in Q2.

Africa achieved target customer satisfaction score (5) for luxury care in Q4.**

**RESULTS**

Engagement between employees and managers activated performance.

Business simulations reinforced confidence for using what was learned.

*Excluding significant decrease for North America in Q3 due to store closure from fire damage.*

**Holiday season and store renovation contributed to increase.*

The Global Gems L&D team recommends global deployment for the gem care specialist training programs. The recommendation is based on findings from the impact investigation, showing:

- The pilot country, Africa, exceeded the growth goal.

- Customer satisfaction scores indicate pilot stores in Africa are

  closer to achieving target scores than stores without gem care specialist training solutions.

- Results from learning surveys and business simulation scores

  indicate learning effectiveness for activating performance.

Results for the impact investigation are persuasive. Based on the findings, Global Gems is making a fact-based, data-informed recommendation to invest in learning and development that measurably impacts employee performance and business goals. The most valuable impact investigations reveal actionable insights and measurable outcomes.

We proactively planned for impact measurement with the impact blueprint, making the impact investigation easier to conduct. We knew in advance the measures, key performance indicators, timing for reporting results, and partners with whom we'd need to work for data access, analysis, and visualization. We had a roadmap for impact measurement with agreement from stakeholders regarding what and when we would report.

Clues, facts, evidence, and data from the investigation indicate that learning impacted both performance and the business goal. Can we claim that training alone drove results? No, we cannot. Have we produced a reasonable preponderance of evidence that shows learning activated performance? Yes, we did.
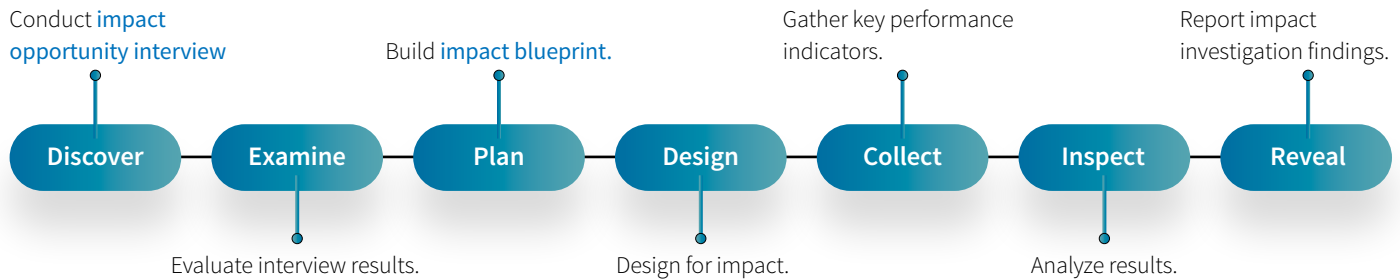
## What Did We Accomplish?

- Discovered opportunity for impact with the impact opportunity interview.

- Planned for impact with the impact blueprint.

- Activated performance with impact-based design.

- Used impact learning surveys to gather clues for impact.

- Investigated impact with key performance indicators.

- Revealed outcomes.

- Made fact-based, data-informed recommendations based on findings.

We solved the impact measurement mystery!

# Investigating Impact: Not Easy, but Possible

We used an abbreviated case study to demonstrate the end-to-end process for investigating impact. Here is the impact investigation timeline:

Conduct impact opportunity interview

Build impact blueprint.

Gather key performance indicators.

Report impact investigation findings.

| Discover | Examine | Plan | Design | Collect | Inspect | Reveal |

Evaluate interview results.

Design for impact.

Analyze results.

The process is the same for a multitude of training programs – including leadership development, customer service, communication, role-specific training, coaching, and technical training to name a few. The purpose of L&D detective work is to discover when learning makes an impact and when it does not. Not all impact stories have a happy ending. Sometimes, the findings will reveal learning had no impact.

> *"Don't be afraid of the 'bad' stories data can tell. Be afraid of not doing anything with the results."*

Results from impact investigations that show little to no impact can be extremely valuable. There's opportunity to improve, adjust, and reactivate learning for desired outcomes. There's also an opportunity to stop doing what is not working. Don't be afraid of the "bad" stories data can tell. Be afraid of not doing anything with the results.

Discovering facts, clues, evidence, and data that demonstrate impact can be complex and challenging. The fifth guiding principle for L&D detective work is, "Investigating impact for learning may not be easy, but it is possible." Hopefully, you've seen how L&D detective methods and techniques reduce complexity and make impact measurement mysteries a little easier to solve.

# You, Too, Can Be an L&D Detective

I am an L&D detective, and I solve mysteries. The mystery I solve is, "What is the impact of learning?" The L&D detective kit shows how I investigate and solve measurement mysteries.

I did not want to create a work deeply rooted in theory. I did not want to be overly academic or so constrained by aspirational best practices that what I shared could not be applied. The intention for the L&D detective kit is to be relevant, helpful, practical, and – most importantly – actionable.

> *"If you focus on the methods, the meaning, and the mindset, I believe you will find what I have shared is transferable across industries and topics."*

The business example we used for the case study may not represent your industry, but it does provide context. The learning solution we used as an example may not be representative of the topics relevant to your industry. However, it illustrates the process. If you focus on the methods, the meaning, and the mindset, I believe you will find what I have shared is transferable across industries and topics.

One of the most important takeaways from the L&D detective kit is the impact opportunity interview. Where I see L&D teams struggle most and miss the greatest opportunity is not considering impact prior to the design and deployment of a learning solution. Impact opportunity interviews consider impact in the beginning, so it will be easier to measure in the end.

Impact is when learning activates performance and a business goal. Training and learning fulfill the highest purpose with measurable impact. My goal was showing you how to measure learning's fulfillment of purpose.

The L&D detective kit is a work of passion and joy for me and was created just for you – the global learning and development community. I hope something I have shared can be applied in your work to enhance your own impact in your organization. And I hope you see now that you, too, can be an L&D detective.

**Kevin M. Yates**

# Kevin M. Yates

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