



# How to Forecast Training Results

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10 Questions that Predict  
Performance Impact

Created by Kevin M. Yates  
for The COURAGE Model©



KEVINMYATES.COM

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## Forecast Impact with COURAGE

What does it take to transform learning and development (L&D) into a performance-focused, results-driven, measurement-based organization? It takes COURAGE! The focus is fulfillment of learning and development's purpose and fact-based evidence for impact on goals and performance.

The E in The COURAGE Model© (see page 22) stands for "Evaluate results with measurement and data". This guide is a recommendation for using data to forecast training's impact on performance. The data is predictive and measures training effectiveness.

### Collecting Predictive Data with Surveys

Traditional post-program training surveys ask participants if they liked the room, the instructor and the food. Performance-based surveys capture data for forecasting training's impact on behavior. These surveys predict change in performance and produce actionable insights for training design and achieving goals.

- How much of what people learned will they use on-the-job?
- Are there barriers that prevent people from using what they learned?
- Is the connection between performance and achieving goals clear?
- Do training programs in our learning portfolio improve performance?

In this guide, you'll find 10 survey questions (and 3 bonus questions) that tell learning and development's story about impact. The focus is data-driven insights and answers. And while the data is predictive, it tells a story about expected performance outcomes.

This guide offers new ideas for using post-program surveys as a predictive tool. It challenges learning and development professionals to think differently about using surveys for behavior-focused, actionable data. The emphasis is estimating performance change as a training outcome.

### One Link in the Chain of Evidence

There are multiple links in the chain of evidence for training results. There is data for performance predictions (this guide's focus), data for knowledge (what people know), data for performance (how people use what they know), data for results (the impact of people using what they know) and data for return on investment (the financial gain or loss for money spent on training and development). Predictive data for performance is just one link in the chain of evidence.

I invite and encourage my learning and development brothers and sisters to try using the performance-based survey questions in this guide as a forecasting tool for performance change. A data-driven measurement strategy shows training and development's value and our impact in the organizations we serve. My hope is that this guide empowers us to be even more value-added with data as evidence for results.



Kevin M. Yates  
Learning & Development Measurement Advisor

## Using this Guide

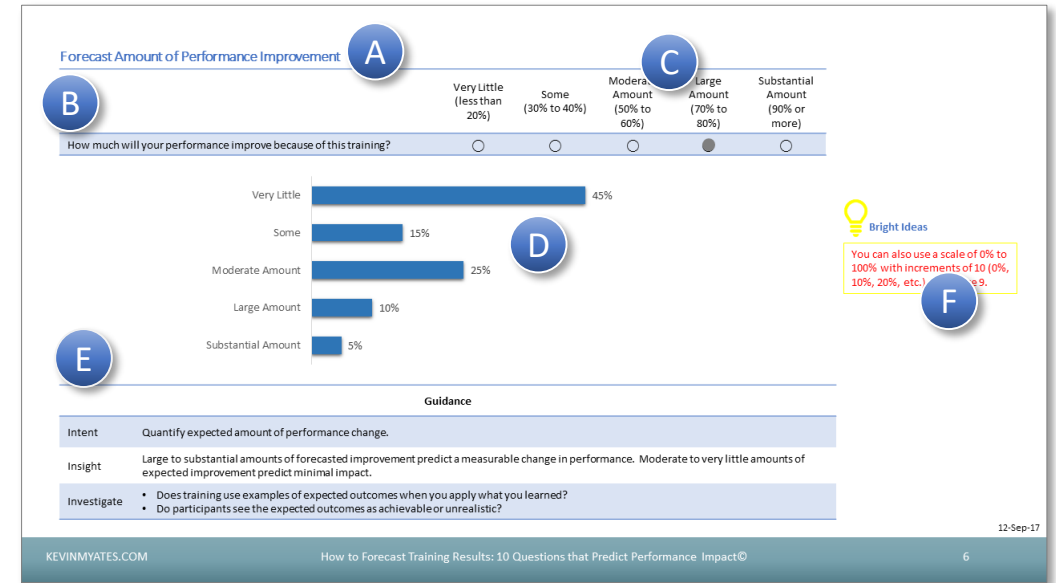
This guide offers recommendations for performance-based Likert scale and open-ended questions for post-training surveys. The questions can be used as a supplement to existing surveys, integrated with surveys already in use or as a replacement survey. You can use as many or as few questions that meet your needs for forecasting performance outcomes.

The survey questions in this guide are particularly helpful for training programs where employee performance is a critical driver for achieving goals. Some questions are less suitable for new hire training where new employees are less familiar with performance expectations. There are, however, a few that might be helpful (pages 7, 10, 12 and 19).

## Document Map

Each page contains sections that show question type, the survey question, Likert scale anchors, ideas for visualizing the results, guidance for using the results and “bright ideas”. Use the following document map as you read through the guide.

- A** **Survey question type** – Identifies the purpose and category for the question.
- B** **Survey question** – The question that captures predictive data.
- C** **Likert scale response anchors** – The scale for answer items.



- D** **Data visualization** – Graphs and charts that show results for the survey question.
- E** **Guidance** – Intention for survey question, insights from results and questions for taking action.
- F** **Bright Ideas** – Thoughts and recommendations for using the results.

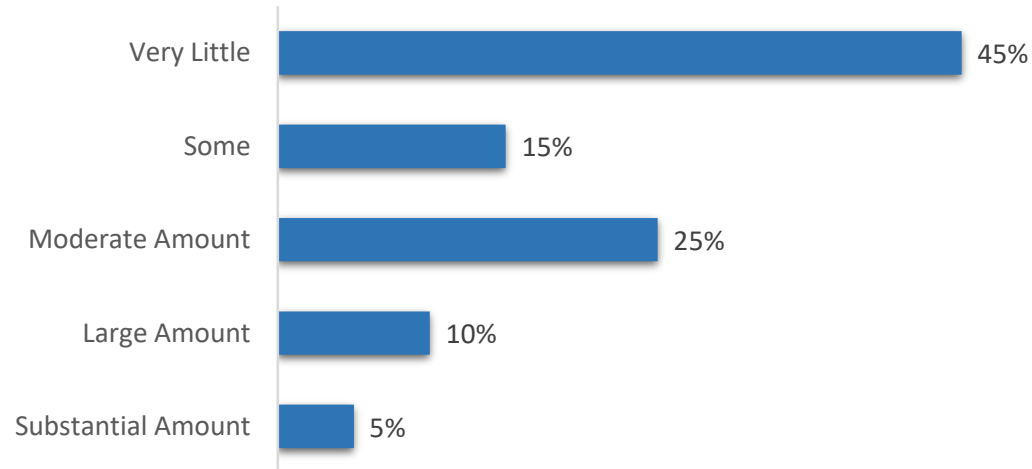


# Survey Data

Likert Scale Questions that Predict Performance Impact

## Forecast Amount of Performance Improvement

	Very Little (less than 20%)	Some (30% to 40%)	Moderate Amount (50% to 60%)	Large Amount (70% to 80%)	Substantial Amount (90% or more)
How much will your performance improve because of this training?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>



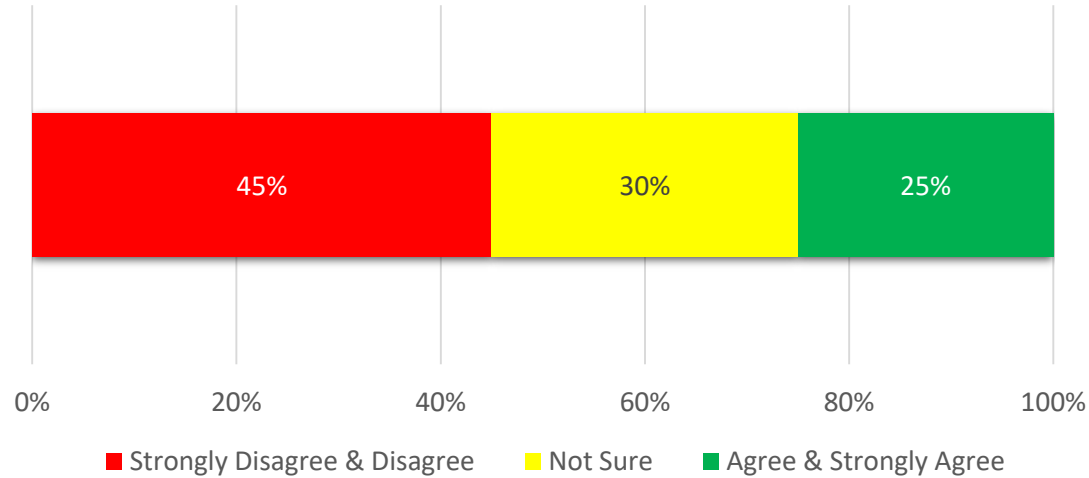
You can also use a scale of 0% to 100% with increments of 10 (0%, 10%, 20%, etc.). See page 9.

### Guidance

Intent	Quantify expected amount of performance change.
Insight	Large to substantial amounts of forecasted improvement predict a measurable change in performance. Moderate to very little amounts of expected improvement predict minimal impact.
Investigate	<ul style="list-style-type: none"> <li>Does training use examples of expected outcomes when you apply what you learned?</li> <li>Do participants see the expected outcomes as achievable or unrealistic?</li> </ul>

## Forecast Performance Impact on Goals

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
I see the connection between using what I learned and achieving the organization goal(s) specified in this training.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

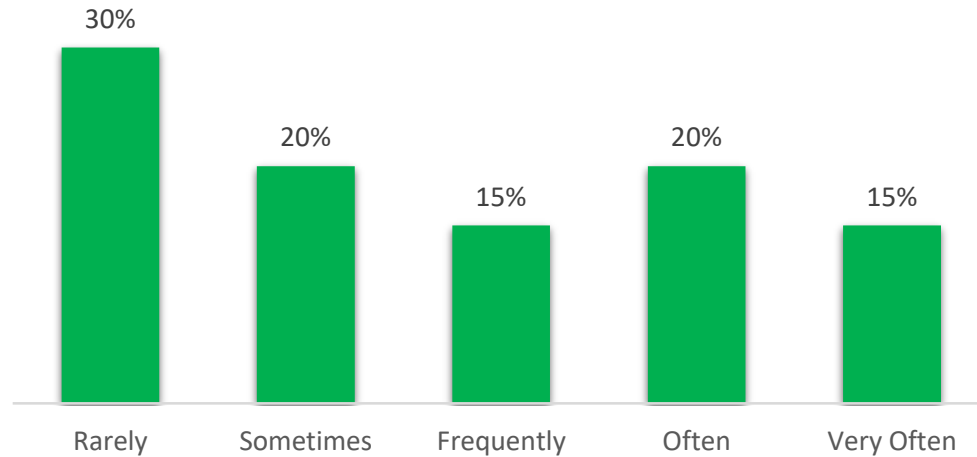
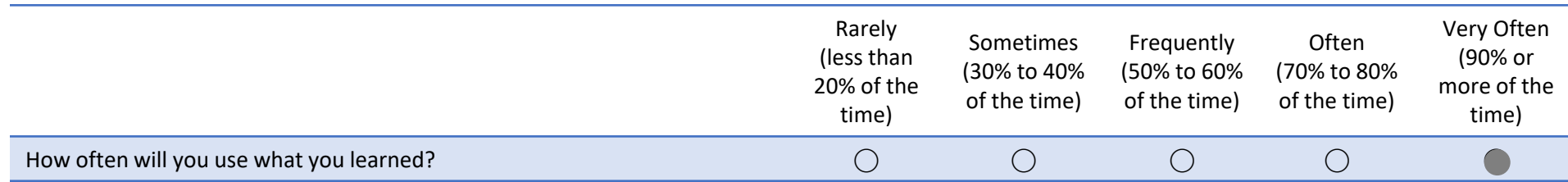


Combine results for Strongly Disagree and Disagree for one total and Strongly Agree and Agree for another total.  
**Bonus!** - Include a video message from a senior leader in the training program that communicates the goal to which the program is aligned and expectations for individual performance to achieve goals.

### Guidance

Intent	Measure levels of agreement and clarity for how individual performance helps reach a goal.
Insight	High levels of agreement predict individual ownership and accountability for achieving goals. High levels of uncertainty and disagreement suggests lack of clarity on goals and/or doubt about self-contribution for achieving goals.
Investigate	<ul style="list-style-type: none"> <li>Is the specific goal to which the training program is aligned clearly communicated?</li> <li>Are performance expectations clearly communicated?</li> <li>Does training show examples or explain the impact on goals when performance expectations are met and not met?</li> </ul>

## Forecast Frequency for Using What Was Learned



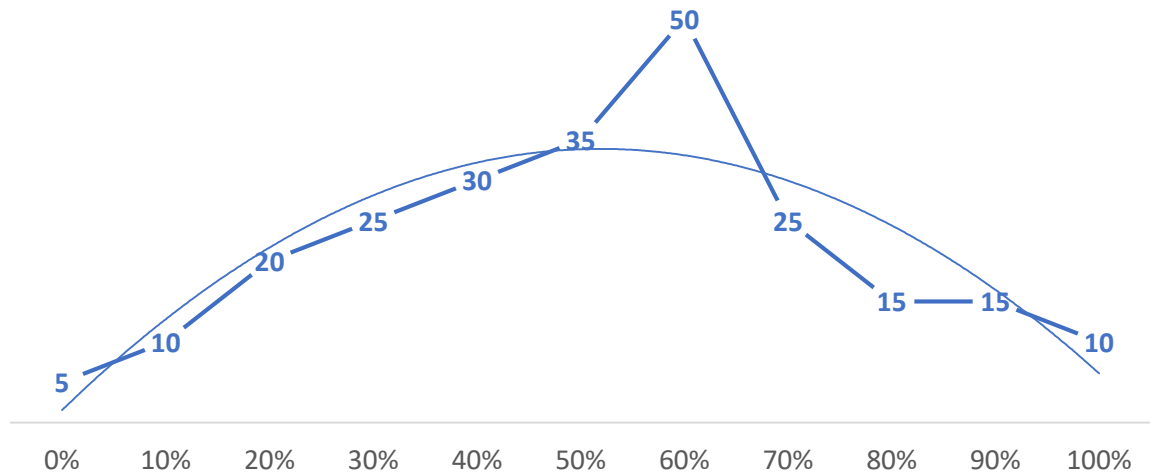
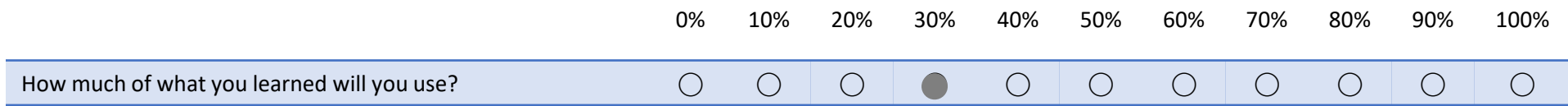
The more often you use what you learned, the more likely it is you'll see a change in performance.

### Guidance

Intent	Predict consistency for using skills and behaviors that impact performance.
Insight	Higher frequency predicts consistency with using skills and behaviors that achieve goals. Lower frequency of use indicates a potential barrier to achieving goals.
Investigate	<ul style="list-style-type: none"> <li>Does training show the connection between using what was learned and achieving goals?</li> <li>Does training show expected outcomes for consistently using what was learned?</li> </ul>



## Forecast Amount of Learning that Will Be Used



### Bright Ideas

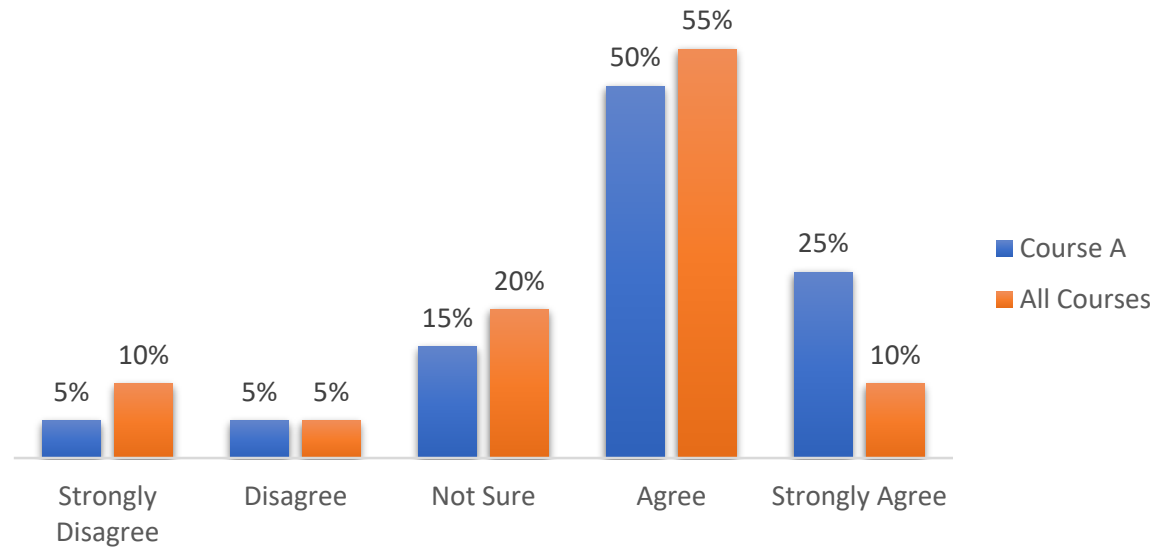
The trend line shows where the most and least amount of learning is likely to be used. Predictions for using lower amounts of learning may indicate content is not maximized for relevance to the target audience.

### Guidance

Intent	Quantify expected amount of learning that will be applied on-the-job.
Insight	Higher amounts of applied learning predict measurable performance improvement. Lower amounts of applied learning predict less likelihood for achieving goals.
Investigate	<ul style="list-style-type: none"> <li>Is there an appropriate volume of content in the training program? Not too much?</li> <li>Does training include knowledge checks for comprehension?</li> <li>Are expectations clear for how much learning to use to meet performance expectations and achieve goals?</li> </ul>

## Forecast Use of Materials for Performance Support

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
The training materials will be helpful on-the-job.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

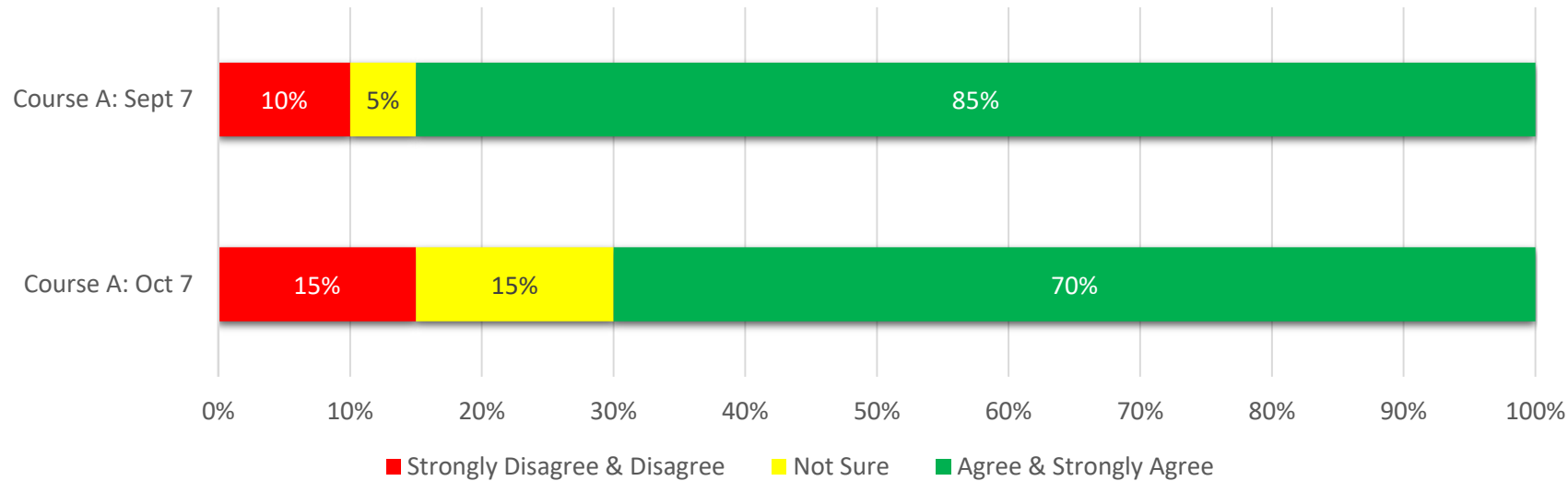
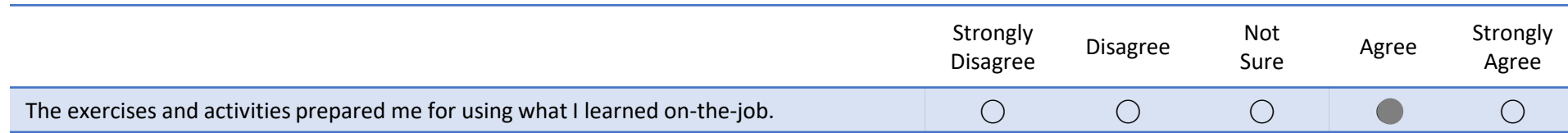


When you compare results for one course to other courses, there is opportunity to leverage what's working in other training programs. You can also show results for one course by itself.

### Guidance

Intent	Measure reliability of training materials as a resource for supporting and sustaining performance change.
Insight	High levels of agreement predict use of training materials beyond the classroom for on-going change in performance. High levels of uncertainty and disagreement suggests opportunity for redesigning materials for duality; classroom instruction and performance support.
Investigate	<ul style="list-style-type: none"> <li>Are training materials a collection of PowerPoint slides with lines for notes or workbook style and referenceable with narrative text, what to do when things go wrong, encountering the unexpected, images, charts, graphs, explanations, research, etc.</li> <li>Do training materials include infographics, idea visualization, job aids and guidance for where to go to learn more?</li> </ul>

## Forecast Impact for Exercises & Activities



Comparing results for different offerings of the same course allows you to see differences and potential causes, i.e. impact of different instructors, different target audiences, etc. You can also show results for one course by itself.

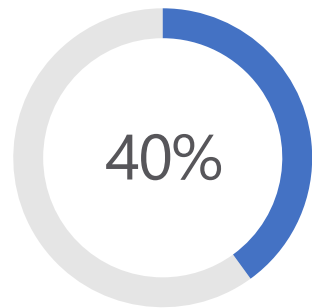
### Guidance

Intent	Measure transferability of training exercises and activities to performance on-the-job.
Insight	High levels of agreement indicate likelihood for attempts at using what was learned. High levels of uncertainty and disagreement predict minimal use of behaviors on-the-job.
Investigate	<ul style="list-style-type: none"> <li>Does training include a balanced mix of instruction and practice?</li> <li>Is practice for best and worst case scenarios included?</li> <li>Does training include feedback, reinforcement and self-assessment for practicing behaviors?</li> </ul>

## Forecast Manager & Employee Engagement

	Yes	No
My manager and I discussed expectations for this training.	<input checked="" type="radio"/>	<input type="radio"/>

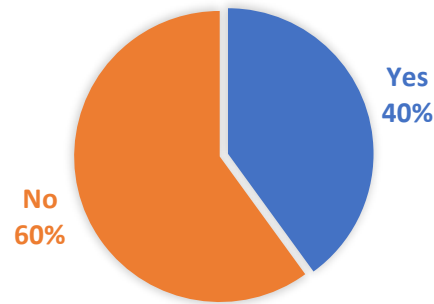
% Employees who set expectations before training



Donut Chart

OR

% Employees who set expectations before training



Pie Chart



Donut charts de-emphasize the use of area to focus on changes in overall values. The focus is reading the length of the arc, rather than comparing the proportions between slices.\*  
**Bonus!** - Pre-training discussion guides help managers and employees align performance with goals and plan for expected training outcomes.

\*[The Data Visualisation Catalogue](#)

### Guidance

Intent	Measure manager and employee engagement before the training program.
Insight	Managers and employees who discuss goal alignment, strategic intent and expected outcomes before training are more likely to see changes in performance.
Investigate	<ul style="list-style-type: none"> <li>• Does the manager have resources to support training?</li> <li>• Is the manager and employee clear about goal(s) to which the training program is aligned?</li> <li>• Is the manager and employee clear about performance outcomes?</li> </ul>



# Survey Data

Open-Ended Questions that Predict Performance Impact

## Forecast Performance Barriers

Are there barriers that prevent you from using what you learned?



Wordles and word clouds show themes and ideas that show up most often in open-ended questions.

### Guidance

Intent	Identify potential obstacles that prohibit or interfere with achieving goals.
Insight	Threats to achieving goals that may be unrelated to training.
Investigate	<ul style="list-style-type: none"><li>• Is there conflict between day-to-day responsibilities and performance expectations for achieving goals?</li><li>• Did design of the training include a member of the target audience for real-world perspective?</li><li>• Are there barriers unrelated to training?</li></ul>

## Forecast Performance Improvement

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How will this training improve your performance?

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### Guidance

Intent	Identify specific behaviors and skills impacted by training.
Insight	Prediction for actions people will take to achieve goals.
Investigate	<ul style="list-style-type: none"><li>• Are there themes that predict where you'll see the highest impact?</li><li>• Were these behaviors and skills taught in a way that might be helpful in another training program?</li></ul>



### Bright Ideas

Look for recurring themes verses comments that may reflect personal biases.

## Forecast Low Performance Impact

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Is there anything about this training that will not improve your performance?

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### Guidance

Intent	Identify where training is least likely to change behavior.
Insight	Prediction for where to not expect behavior change.
Investigate	<ul style="list-style-type: none"><li>• Are there critical skills and behaviors for achieving goals that were seen as less relevant?</li><li>• Is the content aligned with goals and performance expectations?</li><li>• Is there a better way to teach a skill or behavior?</li></ul>



Removing what's not working creates more time for practice, role-play and feedback focused on critical behaviors for performance.



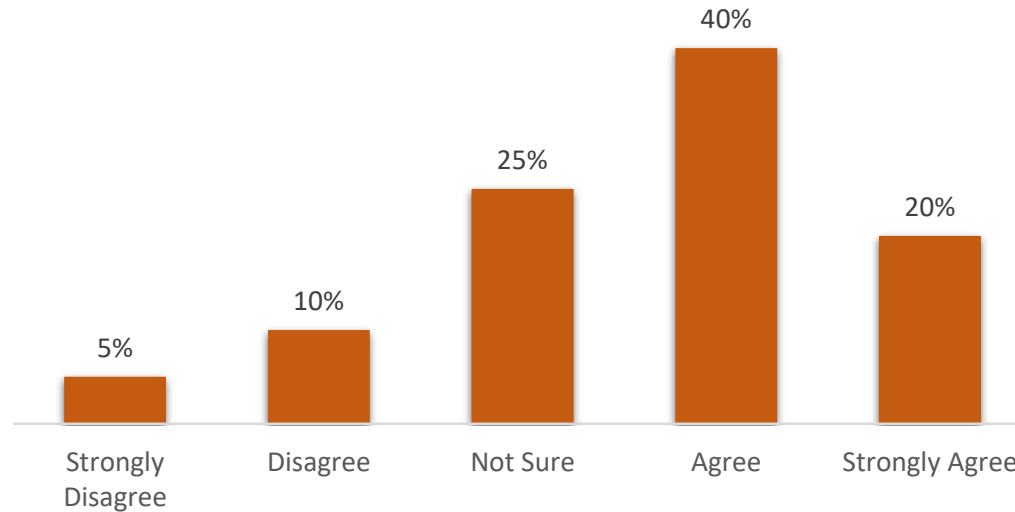


# Survey Data

Bonus Questions

## Forecast Performance Improvement

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
This training will improve my performance on-the-job.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



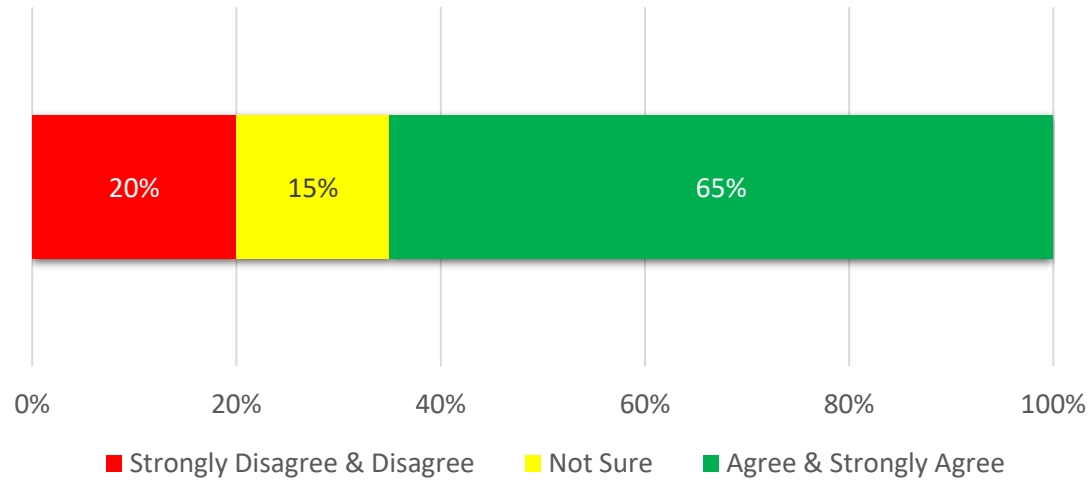
You can also use “Neither Agree or Disagree” or “Neutral” in place of “Not Sure”.

### Guidance

Intent	Measure levels of confidence and agreement for training’s impact on performance.
Insight	High levels of agreement predict strong likelihood for performance change. High levels of uncertainty and disagreement predict little to no performance change.
Investigate	<ul style="list-style-type: none"> <li>• Is the content relevant for real-world, day-to-day performance expectations?</li> <li>• Are there barriers that prevent people from applying what they learned?</li> <li>• Does the training focus on critical behaviors and skills for achieving goals?</li> </ul>

## Forecast Instructor Impact

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
The instructor helped me make connections between the topic and how to use what I learned on-the-job.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>



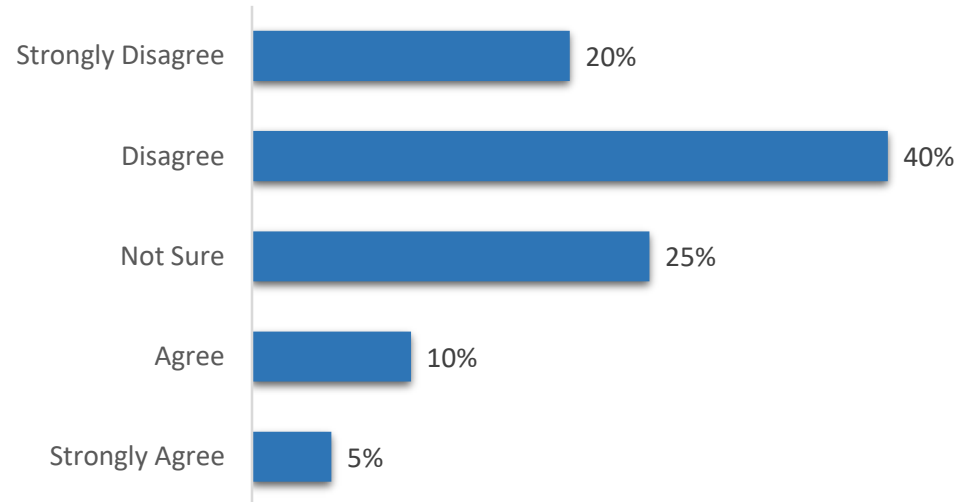
**Bright Ideas**  
 Instructors are most effective when they work in the spirit of coach verses teacher.

### Guidance

Intent	Measure instructor's effectiveness for bridging the gap between theory, concepts, ideas and performance expectations.
Insight	High levels of agreement predict transferability of what was learned to day-to-day performance. High levels of uncertainty and disagreement predict low impact on performance.
Investigate	<ul style="list-style-type: none"> <li>Does the instructor use anecdotal stories and examples for what happens when you use what you learned?</li> <li>Does the instructor have the right mix of subject matter expertise and real-world experience with the topic?</li> <li>Is the instructor a lecturer or a connector of people with ideas, thoughts and concepts?</li> </ul>

## Forecast Impact on Confidence

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
There was enough practice and feedback for me to feel confident using what I learned on-the-job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



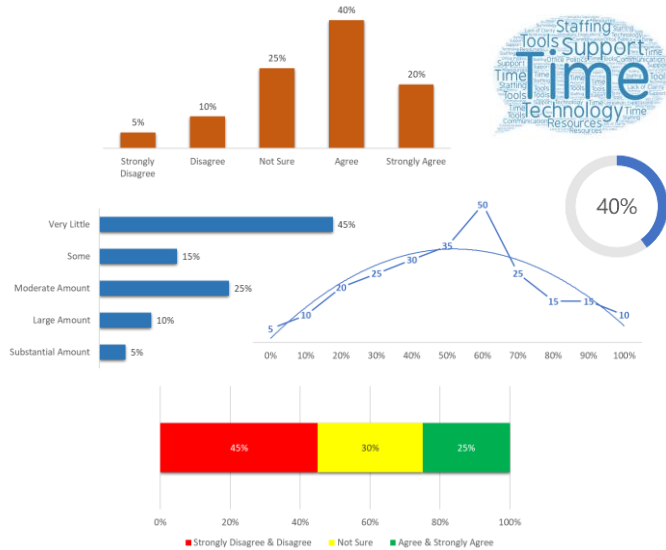
Instruction + Practice =  
Reinforcement

### Guidance

Intent	Measure transferability of training exercises and confidence to perform on-the-job.
Insight	High levels of agreement predict strong likelihood for using what was learned on-the-job. High levels of uncertainty and disagreement predict little to no performance change.
Investigate	<ul style="list-style-type: none"> <li>Do exercises, activities and “real-play” simulate best and worst-case scenarios, hiccups, twists and turns, success, the unexpected, etc.?</li> <li>Is feedback from the instructor and/or trainees for exercises and performance practice part of training?</li> </ul>

## Data Predicts Impact

The power of predictive data lays in the story it tells. A single data point by itself might tell some of the story but not all. Combined data tells the whole story, forecasts impact and creates opportunity for action.



## Story Data Examples

- Employees who see the connection between achieving goals and their individual performance plan on using a large amount of what they learned.
- When we include role-play and simulation in training, people have stronger confidence in their ability to use what they learned on-the-job.
- There is strong agreement that training will improve performance but not significantly.
- Employees who don't expect performance will improve believe the biggest barriers to achieving goals, unrelated to training, are time and technology.

Is there a training program you'd like to forecast for impact on performance? Do you need insights on the effectiveness of training? Try using the questions in this guide to predict outcomes and inform decisions for instructional design. See the appendix at the end of this document for a performance-based survey example.

Training and development fulfills its highest purpose when it impacts goals and performance. Forecasting training's impact helps with estimating the results you can expect. Is there data that predicts the impact of training and development on performance? Yes there is!

Do you have questions about using this guide? Or maybe you'd like to brainstorm and share ideas about measurement, evaluation and analytics for learning and development. Do you need help with your strategy for measuring the impact of training and development? Contact Kevin at [kevin@kevinmyates.com](mailto:kevin@kevinmyates.com). He'd love to hear from you!

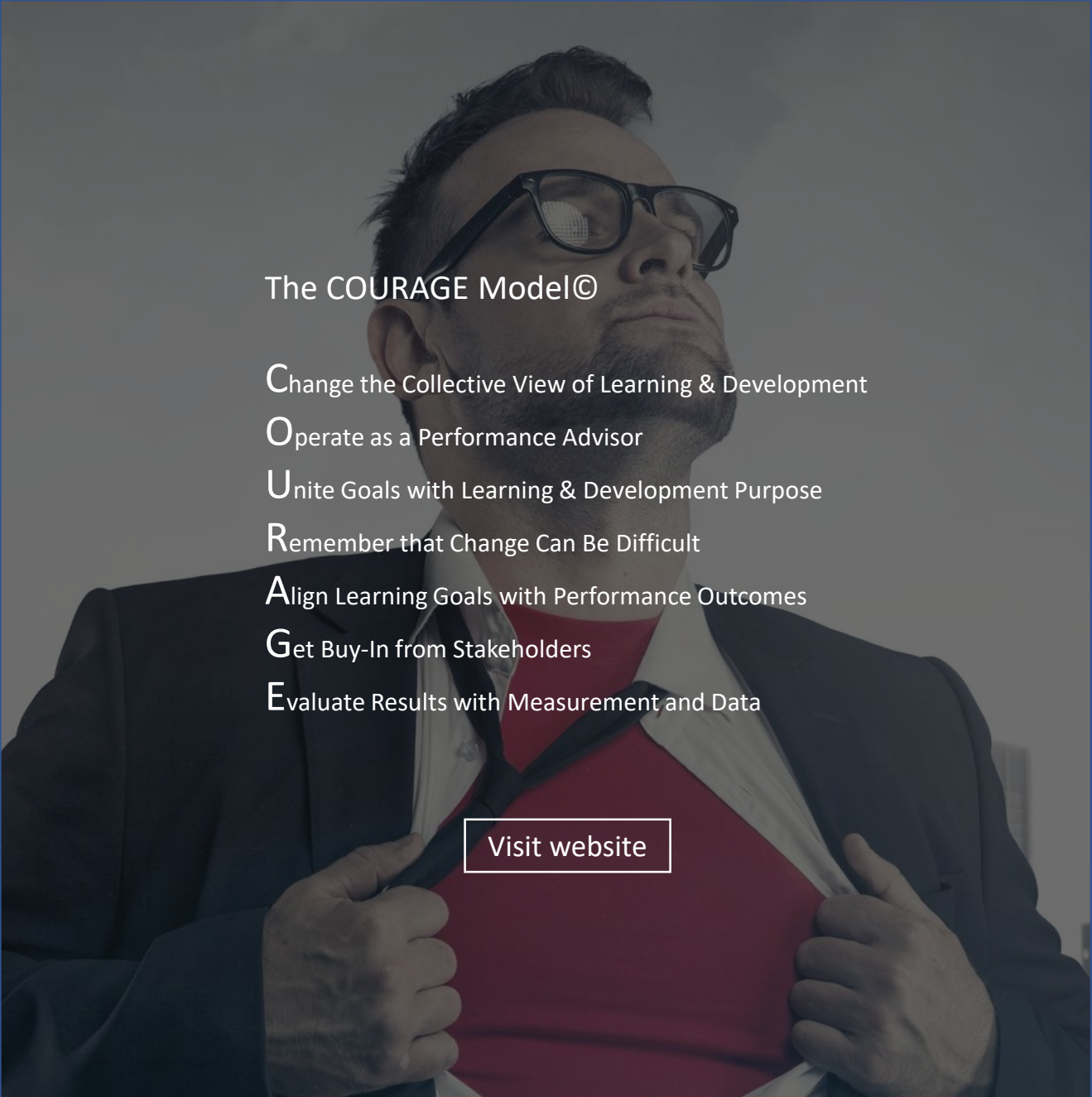
“We don't have to wish, hope or believe learning and development makes an impact. We have the data to prove it.”



Kevin M. Yates  
Learning & Development Measurement Advisor

Thanks to Adrian Bazemore, Adrian Saldana and Christy Puller for edits and inspiration

12-Sep-17



## The COURAGE Model©

**C**hange the Collective View of Learning & Development

**O**perate as a Performance Advisor

**U**nite Goals with Learning & Development Purpose

**R**emember that Change Can Be Difficult

**A**lign Learning Goals with Performance Outcomes

**G**et Buy-In from Stakeholders

**E**valuate Results with Measurement and Data

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# Appendix

## Performance-Based Survey Example

	Very Little (less than 20%)	Some (30% to 40%)	Moderate Amount (50% to 60%)	Large Amount (70% to 80%)	Substantial Amount (90% or more)
1. How much will your performance improve because of this training?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
2. I see the connection between using what I learned and achieving the organization goal(s) specified in this training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Rarely (less than 20% of the time)	Sometimes (30% to 40% of the time)	Frequently (50% to 60% of the time)	Often (70% to 80% of the time)	Very Often (90% or more of the time)
3. How often will you use what you learned?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Very Little (less than 20%)	Some (30% to 40%)	Moderate Amount (50% to 60%)	Large Amount (70% to 80%)	Substantial Amount (90% or more)
4. How much of what you learned will you use?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
5. The training materials will be helpful on-the-job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. The exercises and activities prepared me for using what I learned on-the-job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Yes	No			
7. My manager and I discussed expectations for this training.	<input type="radio"/>	<input type="radio"/>			
8. Are there barriers that prevent you from using what you learned?					
9. How will this training improve your performance?					
10. Is there anything about this training that will not improve your performance?					

-See next page for bonus questions-



Bonus Questions

Use before question #1	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
This training will improve my performance on-the-job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use before question #5	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
The instructor helped me make connections between the topic and using what I learned on-the-job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use before or after question #6	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
There was enough practice and feedback for me to feel confident using what I learned on-the-job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>