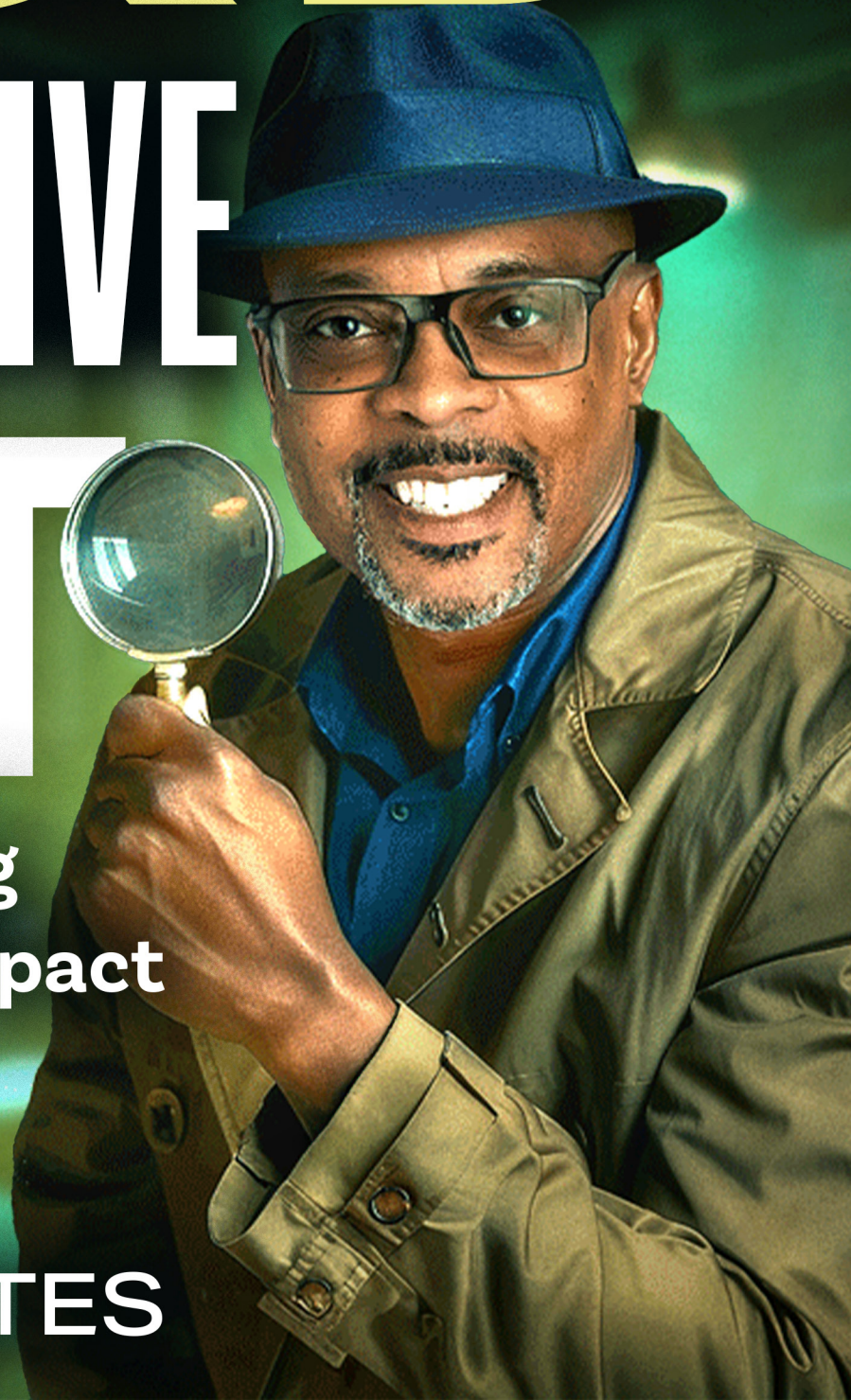


# L&D

# DETECTIVE KIT

For Investigating  
Performance Impact

KEVIN M. YATES





# DEDICATION

**A.D. Dietrich:** You encouraged me to pursue measurement as a career, and for that, I will be forever grateful.

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**Patti & Jack Phillips, ROI Institute:** You are my dearest measurement “mom” and “dad”. I am beyond grateful for your guidance, mentoring, and support, and I am honored to be your measurement “son”.

---

**Dick Handshaw:** Thank you for inspiring me to focus on performance impact as an outcome for training and learning.

---

**David Vance & Peggy Parskey:** Your example of being in the measurement trenches motivates me to be the best measurement expert I can be.

---

**Sardek Love:** I followed your journey long before you knew mine. Your presence, your voice, and your expertise were undeniable. When I reached out and asked you to be my mentor, you welcomed me with open arms. I wanted to stand where you stood, speak as you spoke, and master the stage as you do. Then, one day, you told me I had already become everything I aspired to be. You have been my mentor, my friend, and my inspiration. Thank you for seeing me, believing in me, and lifting me up.

---

**Edmund Monk, The LPI:** You put me on the world stage with my first European speaking engagement. For that, I will always be grateful, my L&D brother from another mother.

---

**Andy Storch, Talent Development Think Tank:** The best friends are the ones who mention your name in rooms you are not in. You are that friend. I appreciate you bro!

---

**Dirk Tussing, Executive Learning Exchange:** There will always only be one first. Thank you for giving me my first speaking opportunity.

---

**Trish Uhl:** You showed me that “superstars” are people too. Thank you for being my friend and an amazing human being.



**Ken Phillips:** You embody Maya Angelou's words: "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." Thank you for making me feel valued and relevant in the L&D community. Rest in peace, my friend. You are missed.

---

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---

**Markus Bernhardt, Josh Cavalier, Hadiya Nuriddin, Alaina Szlachta & Shannon Tipton:** Thank you for ensuring my thoughts and ideas are optimally represented in this body of work. I am grateful for your time and talent.

---

**Global Training, Learning, & Talent Development Community:** The voice I have in our community, I did not give to myself. You gave it to me. You elevated my voice. You were curious about my thoughts and ideas. You trusted my experience, expertise, and explanations. You invited me to speak at conferences and placed me on global stages. You asked me to write articles for industry magazines and blogs. You invited me to join podcasts. You embraced my mindset, message, and method for investigating impact. You championed and promoted the L&D Detective® brand. My commitment to you is being honest, responsible, and accountable for the voice you have given to me. I am here in humble service to you and eternally grateful for you and our community.

---

**Ella R. Yates, Mother:** You are my biggest cheerleader. You get excited when I tell you what stage in the world I'll be on next. You save program guides from my speaking engagements and are disappointed when they are only online and digital, LOL. You write down on pieces of paper where I'm going and what I'll be doing so you can share with family and friends. You see the greatness in me that I don't always see in myself. You celebrate every win, no matter how big or small. You pray for me daily. Of all the women who could have been my mother, God gifted you to me, and me to you. You are the most cherished, beloved gift I will ever receive, and for that, I am grateful. I love you Mama.





## ABOUT THE AUTHOR

**Kevin M. Yates**, known in the global training, learning, and talent development community as the **L&D Detective®**, is a leading expert in investigating the impact of training and learning on workplace performance. Unlike some who only discuss measurement in theory, Kevin has done the work. He has solved measurement mysteries at some of the world's most recognized brands. His career includes measurement roles with Grant Thornton, Kantar, McDonald's, and Meta (Facebook), where he applied data-driven methods to uncover how learning contributes to improving, sustaining, and maintaining performance. He has hands-on experience using facts, clues, and evidence to measure how learning affects human and business performance.

With over 25 years of experience, Kevin has worked in multiple roles, including instructional design, facilitation, onboarding, learning operations, leadership development, learning analytics, and impact measurement. His work spans multiple industries, including financial services, professional services, education, media, marketing, insurance, food services, and social media. This broad experience across roles and industries informs his unique perspective on measuring impact. It allows him to navigate complex workplace environments, evaluate business needs, and assess learning's role in driving both short-term results and long-term performance sustainability. Through global keynotes, workshops, and consulting, Kevin empowers L&D professionals with actionable strategies to measure results.

As founder of Meals in the Meantime, a nonprofit organization fighting food insecurity in Chicagoland's south suburbs, Kevin applies the same principles of measurable impact to drive meaningful community change. Through pop-up food pantries, Meals in the Meantime provides free, fresh, healthy, and high-quality grocery bags of food for individuals and families in need. Kevin's approach remains the same in both business and the community focusing on intentional, measurable, and actionable impact. Through his work, Kevin continues to challenge conventional thinking about training measurement. His investigative approach is rooted in facts, clues, and evidence, transforming how organizations examine training, learning, and talent development's contribution to business goals, workforce capabilities, and long-term performance sustainability. His mission is helping L&D professionals become impact investigators who measure what matters, tell the truth about training's effectiveness, and build credible cases for how L&D contributes to workplace performance.



# CONNECT WITH KEVIN

If you'd like to discover more about Kevin and his work, visit his websites

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# INTRODUCTION

## The Mystery Begins: Investigating Performance Impact

For too long, learning and development (L&D) professionals have been searching for definitive answers. We talk about measuring impact. A lot. But aspirational pontification isn't the same as actual practice. Despite good intentions, L&D teams struggle to turn conversations into action. We discuss measurement more than we practice it.

**What is the impact of training & learning on workplace performance?**



Instead of clear, fact-based results, we rely on surveys, LMS data, and self-reported feedback to estimate impact. But estimation isn't enough. We need evidence. We need facts. We need proof.

My experience tells me that training alone is not the sole solution for moving or maintaining performance. It plays a role, but it's not the only factor. If we try to measure impact in isolation, we ignore the full picture. That's why I shifted my focus from estimating training's "slice of the pie". Now, Investigate how training and learning as an experience, and L&D as a function, contribute to the workplace performance ecosystem.

Writing this book has been a labor of love for me. It reflects the transformation of my thinking about measurement and impact. I created the **L&D Detective Kit for Investigating Performance Impact** as a gift to the global training, learning, and talent development community. The community has given me a voice, trusted my expertise, and supported my work. As a way to say thank you, I made this book free so that anyone who wants to investigate impact has access to an actionable, performance-focused approach. There should never be a barrier to discovering how to measure training and learning's contribution.





Measuring impact hasn't always been easy for me. There were times when I ran into challenges, had to rethink my approach, and couldn't find the answers I was looking for. Some situations made me realize that training wasn't the solution, while others left me completely stumped. I've had my fair share of head-scratching moments, and if frustration led to hair loss, that might explain a few things! But those experiences, while difficult, were valuable. They helped me recognize what is possible, what is not, and how to navigate measurement with greater confidence. Each challenge helped me refine my approach and sharpen my insights.

I wrote this book to share what I have learned from both the times when measurement worked well and the times when it didn't go as planned. My goal is helping you build the skills and confidence to measure impact in a way that is meaningful, credible, honest, and practical. I want to set realistic expectations about what impact measurement can achieve, and I want to empower you with tools to investigate impact with clarity and purpose. Most of all, I hope this book supports you on your journey to becoming an effective and insightful impact investigator. **In this book, you'll discover:**

- Techniques for measuring collective contributions that influence workplace performance, including but not limited to training and learning.
- Ways to determine whether training is the right solution and strategies for planning for impact when it is.
- An exploration of how business and human performance interact within the workplace performance ecosystem.
- The detective work for building a compelling case for learning's role in moving or maintaining performance.
- A proactive approach to plan for impact in the beginning, which makes it easier to measure in the end.

I created the **L&D Detective Kit for Investigating Performance Impact** just for you! This is not just theory. It's practice. Talking about measurement won't get us the answers we need. Investigating impact in realistic, achievable, honest ways will.

It's time to find the facts, reveal the evidence, search for clues, and solve measurement mysteries. Your journey as an impact investigator starts now!



**KEVIN M. YATES®**  
L&D DETECTIVE



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# 01

## THE L&D DETECTIVE® METHOD

### The Process for Investigating Impact

Every great investigator knows that the first clue is rarely the whole story. When it comes to training and learning, the real mystery is this: What is the impact?

Is training and learning just an experience, or does it contribute to real business and human performance? Do we have the facts, clues, and evidence to prove it? And if we can, how do we solve the measurement mystery?

That's exactly what this eBook is about. The L&D Detective Kit for Investigating Performance Impact empowers you with investigative techniques that go beyond idealistic aspirations and into actionable practices. My goal is empowering you to become an impact investigator, someone who doesn't just measure training but investigates its role in workplace performance with precision and credibility.

Here's a fact: Training alone does not move or maintain performance. It's part of a much larger ecosystem. The challenge isn't only about proving that learning matters; it's about demonstrating where, when, and how it contributes to performance. These are my guiding principles for investigating performance impact:

1

Conduct a  
performance  
needs analysis

2

Define impact  
before investi-  
gating it

3

Select a business  
performance  
metric as the sig-  
nal for impact

4

Align with  
stakeholders  
on what impact  
looks like

- **Conduct a performance needs analysis** – Before assuming that training is the answer, investigate what’s going on in the performance ecosystem.
- **Define impact before investigating it** – You can’t measure what you haven’t clearly defined.
- **Select a business performance metric as the signal for impact** – LMS data and surveys only tell part of the story. Business metrics reveal real performance impact.
- **Align with stakeholders on what impact looks like** – Get agreement upfront, so everyone is on the same page about what impact looks like when it shows up in the workplace performance ecosystem.

These guiding principles shape every chapter in this eBook and are the secret to my success. As you embark on this measurement journey, you’ll gain the mindset, tools, and techniques to solve measurement mysteries and uncover training’s true contribution.

## 10-Step Process for Investigating Impact



There’s a ten-step process I use for investigating impact. It ensures learning solutions are not just activities but strategic drivers of measurable results. Whether your goal is skill enhancement, sustaining excellence, or driving business growth, the method provides a clear, evidence-based process that uncovers how training and learning as an experience and L&D as a function contributes to human and business performance.

- 1 Training request recieved** – The L&D team receives a request for training, often based on a challenge, gap, or opportunity.
- 2 Workplace performance investigation conducted**– Instead of assuming training is the answer, an impact investigator examines the root cause of the performance issue or opportunity with the Workplace Performance Investigation Framework.
- 3 Investigation results examined** – Findings are analyzed to determine if training is needed or if another solution would be more effective.





- 4** **The go or no decision** – This step confirms whether an L&D solution is the right intervention. If training can make a measurable impact, we move forward. If not, alternative recommendations are provided.
- 5** **Building the case for impact** – If training is the right solution, a Performance Impact Blueprint is created to summarize findings and build a detailed plan for training and learning’s contribution to the business goal.
- 6** **Share impact blueprint with stakeholders** – The plan for impact is presented to ensure alignment and agreement before moving forward.
- 7** **Create instructional design for performance** – Training and learning solutions are designed with a clear link to performance outcomes, incorporating reinforcement, real-world application, and measurable indicators using the Instructional Design for Performance Framework.
- 8** **Develop and implement training and learning solutions** – The solution(s) is built and deployed with strategic alignment with business goals.
- 9** **Prepare impact facts and findings** – The impact investigator collaborates with other workplace performance contributors to assess collective contributions to the business goal.
- 10** **Present findings to stakeholders** – A final report is shared, capturing all contributions in the workplace performance ecosystem that are contributing to achieving the business goal.

If training is not the appropriate solution, alternative recommendations may include:

	Process improvements		Technology enhancements
	Policy changes		Leadership-driven initiatives
	Other strategic business solutions		

## Frameworks & Tools that Power the L&D Detective® Method

Investigating the impact of training and learning on workplace performance requires a structured approach. The L&D Detective® Method is supported by three essential frameworks and tools that guide the investigative process, ensuring fact-based, actionable insights. These frameworks and tools work together, with the **Workplace Performance Investigation Framework** serving as the foundation for informed decision-making in the **Performance Impact Blueprint** and **Instructional Design for Performance Framework**.

### Workplace Performance Investigation Framework

This framework helps uncover the facts about workplace performance by examining business and human performance contributors. It guides impact investigators in identifying what needs to be measured, ensuring alignment with business goals, and determining the conditions for meaningful impact. The insights gained from this investigation inform the other two frameworks.

### Performance Impact Blueprint

Built on findings from the Workplace Performance Investigation Framework, the Performance Impact Blueprint establishes a clear plan for measuring and evaluating impact. It defines key performance indicators, business metrics, and success criteria, ensuring that measurement is intentional and focused from the start.



## Instructional Design for Performance Framework

Rooted in the workplace performance investigation and blueprint, this framework ensures that training and learning solutions are designed with performance activation in mind. It connects learning outcomes to measurable business and human performance goals, reinforcing the idea that training must be a driver of workplace performance.

As you move through this book, you'll discover how each of these tools and frameworks plays a role in solving measurement mysteries. By the end, you'll have a clear roadmap for investigating and demonstrating training's role in workplace performance with confidence and credibility.

You'll note that in this book, I use the phrase "training and learning" frequently. What I mean is both the experience we create and the outcome we expect. Training is what L&D delivers. Learning is what people do as a result. I use the two words together because they describe the full journey. They represent what we provide and what we hope happens next. You'll also see references to training solutions and learning solutions. These terms are used interchangeably to describe what L&D creates with the goal of activating performance.

The L&D Detective Kit for Investigating Performance Impact is not just about measurement; it's your personal guide to becoming an impact investigator. Each chapter builds on the last, deepening your investigative skills and enhancing your ability to measure training's contribution to workplace performance. As a way to demonstrate "how-to", we will use a case study for the Total Tech & Talent company that illustrates application of the tools and frameworks. Get ready to uncover the truth and collect facts, clues, and evidence to solve a measurement mystery. If you're ready to move beyond reporting learning activity and start proving real performance results, The investigation starts now!



# 02

## IT TAKES A VILLAGE TO IMPACT WORK PERFORMANCE

### Chapter Preview

Workplace performance is not the result of a single factor. It takes a village. It requires a collective effort from multiple teams, functions, and influences. Understanding this interconnected reality shifts how we investigate impact. In this chapter, we will examine:

1. The L&D Detective® **definition for impact** and **why contribution matters** more than isolation.
2. How **business performance** and **human performance** together define workplace performance.
3. The **role of multiple contributors** in shaping and sustaining performance.
4. Why skilled impact investigators move **beyond proving training's effect in isolation**.
5. How **recognizing collective contributions** enhances L&D's strategic influence.

### The L&D Detective® Definition for Impact

Impact is a word often used in learning and development, but its meaning varies. For some, it's measured by consumption, utilization, participation, attendance, and volume of training programs and learning solutions; data you get from an LMS. For others, it's reflected in training survey results that capture opinions, sentiment, and satisfaction. While these metrics provide valuable insights into activity and employee reaction to their learning experience, they do not answer the most important question: Did training and learning contribute to workplace performance?

As the L&D Detective®, my approach to impact begins with a performance-first mindset. **Impact, as I define it, is the result of collective contributions in the workplace performance ecosystem that empower business goals.** When conducting an impact investigation, I search for facts, clues, and evidence that reveal how training and learning as an experience, and L&D as a function, influence both business and human performance. The word “contribute” is used with intention. That’s because training, learning, and L&D alone don’t “fix” performance. They are part of a broader ecosystem where many forces come together to shape results.

**When conducting an impact investigation, I search for facts, clues, and evidence...**



My definition of impact guides and informs every investigation I conduct. It ensures that I am not measuring training in isolation but within the full context of business and human performance. When I investigate impact, I examine all elements that have the power and potential to influence workplace performance. Training and learning play a role, but they do not act alone. With this mindset, I stay grounded in real-world performance realities, focusing on contribution rather than the idea that training alone can save the day.

## Investigating Collective Contribution: A Shift in Thinking



Workplace performance is not the result of any single factor. It takes a village. Training and learning exist within a broader system where recruitment, technology, marketing, operations, leadership, and other teams contribute to business performance. Achieving measurable performance outcomes requires more than training. It requires alignment across multiple functions, including hiring the right people, technology solutions, adjusting policies, launching marketing campaigns, improving operations, and other contribution initiatives. Similarly, human performance is activated by multiple influences including but

but not limited to manager support, workplace culture, compensation, workload, and motivation. Recognizing the power of the village is what sets skilled impact investigators apart. The L&D Detective® Method embraces this reality, acknowledging that no single factor drives success in isolation.

Skilled impact investigators move beyond proving whether training “worked” to demonstrating how it contributed within the larger system of workplace performance. The ability to connect training to business and human

performance positions L&D as a strategic, evidence-informed function. By examining how various elements intersect and contribute to performance, impact investigators build a more credible case for training and learning as an experience and L&D as a function's role in the workplace performance ecosystem. Embracing the idea of collective contribution is a game-changer for L&D, reinforcing the undeniable truth: It takes a village to impact workplace performance.

## The Formula for Workplace Performance

Workplace performance is the result of two key forces working together: business performance and human performance. These forces combine to create the workplace performance ecosystem, where multiple contributors influence success. The formula is simple but profound: business performance plus human performance equals workplace performance. This equation is essential for impact investigators because it frames how training and learning fit within the broader system of performance.



To investigate impact effectively, impact investigators must move beyond viewing training as a standalone intervention. Instead, you must adopt a mindset that recognizes workplace performance as a dynamic system shaped by various contributions. This shift in thinking allows for a deeper understanding of how training interacts with other performance drivers and ensures that measurement is focused on real outcomes, not isolated learning events.

As an impact investigator, your role is to uncover how training and learning contribute to workplace performance within this ecosystem. This means analyzing how business performance and human performance align, interact, and influence results. Your investigation is not just about proving training's value. It is about revealing the truth of its role within the broader system and ensuring that contribution is accurately measured and reflected.

Investigating workplace performance means identifying who and what contributes. Here's what that looks like:



## Business Performance Contributors

Achieving business goals requires contributions from multiple teams. While every organization has a unique structure, the principle of collective contribution remains the same. Some examples of business performance contributors include:

**Marketing** – Drives brand awareness, customer engagement, and creates interest in products and services.

**Technology** – Develops tools and systems that enable efficiency and productivity.

**Product Innovation** – Creates solutions that meet evolving market needs.

**Customer Service** – Enhances customer satisfaction and fosters loyalty.

**Operations** – Ensures business processes run smoothly and efficiently.

**L&D** – Strengthens skills, knowledge, and capabilities that support performance.



Each of these teams plays a role in achieving business outcomes. My role as the L&D Detective®, and yours as an impact investigator, is investigating the connections, identifying where and how these contributions intersect to drive success.

## Human Performance Contributors

Just as business performance requires collective contribution, human performance is influenced by multiple factors:

**Manager Coaching and Support** – Effective managers provide guidance, feedback, and reinforcement that shape employee performance.

**Workplace Culture** – The environment, norms, and values influence motivation, engagement, and accountability.

**Compensation and Rewards** – Competitive pay, bonuses, and recognition impact motivation and retention.

**Tools and Technology** – The availability of modern, efficient tools affects productivity and job performance.

**Workload and Job Design** – A well-structured workload and clear role expectations enable employees to perform at their best.

**Natural Ability and Motivation** – Individual skills, talents, and intrinsic drive contribute to performance.

**Training and Development** – Learning experiences provide employees with the knowledge, skills, and confidence to perform effectively.



These factors act like levers that can be adjusted to optimize human performance. As the L&D Detective®, my investigations consider all these elements, not just training. I consider how training and learning as an experience and L&D as a function contribute to the workplace performance ecosystem.

The ability to measure and articulate the contribution of training within the larger performance ecosystem is what makes an impact investigator truly effective. When you move beyond training in isolation and embrace a holistic approach, you shift the narrative from proving training's worth to demonstrating its role in driving performance. This mindset is at the heart of solving measurement mysteries and uncovering the truth about how workplace performance is activated. Collective contribution is not just a theory; it is a strategic imperative for investigating, measuring, and communicating impact.

## The Workplace Performance Ecosystem: A Holistic View of Impact

Imagine workplace performance as a vast galaxy, expansive and interconnected, with business goals at its center. Every element within this galaxy plays a role in shaping and influencing those goals. Just as planets, stars, and cosmic forces interact to create a thriving galaxy, business and human performance contributors form an intricate ecosystem that determines workplace success.

Within this galaxy, training and learning are not isolated elements moving aimlessly through space. They are gravitational forces that pull together skills, knowledge, and capabilities, ensuring alignment with the larger system. The workplace performance ecosystem is not static. It is dynamic, ever-evolving, and shaped by the continuous contributions of multiple players. Training and learning as an experience and L&D as a function do not operate in a vacuum but instead interact with all the surrounding elements, including employee engagement, workplace culture, operational processes, tools, technology, and more.

### Workplace Performance Ecosystem

Measuring L&D's contribution means assessing how it strengthens the forces that influence business goals, ensuring that learning is not just consumed but activated for performance. This shift in thinking, from measuring training as a planet in a galaxy by itself to understanding its role within the galaxy of workplace performance, is the foundation for investigating performance impact. It is the key to solving measurement mysteries and revealing the truth about learning's role in workplace performance ecosystems.



## Chapter Review

**Impact is collective contributions in the workplace performance ecosystem that empower business goals.** It is not an isolated event. This chapter reinforced the shift from focusing on training's isolated effect to examining how training and learning interact with other performance contributors. Business performance and human per-

formance must be investigated together to understand how workplace goals are achieved. Impact investigators who embrace this mindset move beyond outdated measurement tactics and position L&D as a strategic driver of workplace success. Understanding the power of collective contribution within the village allows us to tell a more compelling, truthful story about how performance is influenced and sustained.

## Impact Investigator Actions

1. Investigate the performance ecosystem by identifying the full range of business and human performance contributors influencing results.
2. Search for evidence across functions by engaging with teams outside of L&D to understand their role in workplace performance.
3. Shift from proving to uncovering by focusing on how training contributed to performance rather than whether it “worked” in isolation.
4. Examine intersections by exploring how training and learning interact with other influences like systems and culture.
5. Anchor your investigation in contribution by keeping your focus on how L&D supports performance, not how it single-handedly creates it.

## What's Next?

Now that we've established that workplace performance is a shared responsibility, how do we investigate it? The next chapter introduces a structured framework. It helps us uncover the facts, clues, and evidence behind performance impact. Get ready to explore the Workplace Performance Investigation Framework. This tool transforms how we measure contribution.



# 03

## WORKPLACE PERFORMANCE INVESTIGATION FRAMEWORK

### Chapter Preview

Solving measurement mysteries requires a methodical approach. The Workplace Performance Investigation Framework is designed to uncover the facts, clues, and evidence needed to examine performance impact. In this chapter, we will explore:

1. The **purpose** and **structure** of the Workplace Performance Investigation Framework.
2. How to investigate business performance and human performance with **targeted questions**.
3. The **difference** between assumptions and evidence-based insights.
4. How the framework helps **align training with measurable business goals**.
5. A **real-world case study** illustrating the framework in action.

### The Foundation for Investigating Impact

If you do not plan for impact in the beginning, measuring it in the end becomes difficult, if not impossible. Workplace performance is influenced by multiple contributors, and training is just one piece of the puzzle. The mistake many make is starting with training without considering the broader performance ecosystem. When the goal is workplace performance impact, training and learning must align with the collective contributions that empower business goals. True impact is revealed through discovery, not assumptions.

The right question isn't, "What training do we need?" but rather, "How can we contribute to workplace performance?" The Workplace Performance Investigation Framework helps answer that question by guiding informed decisions about the right solutions, which may or may not include training.

The framework is fueled by curiosity, leading us to discover the real factors influencing performance. Unlike traditional training needs analysis, which often focuses on tactical logistics, this framework takes a strategic approach. It does not assume training is the solution. Instead, it ensures that every recommendation is based on a thorough investigation of business goals, human performance requirements that help achieve those goals, and the conditions that influence impact.

The Workplace Performance Investigation Framework is the foundation of the L&D Detective® Method and the key to becoming a successful impact investigator. Discovery is at the heart of our work. We are not just identifying gaps; we are uncovering clues, searching for evidence, and piecing together the full story of workplace performance. The framework shifts us from simply delivering training to investigating the conditions, contributors, and constraints that shape performance. It is about being deliberate, intentional, and evidence-driven. When we lead with curiosity and a commitment to discovery, we don't just measure impact. We achieve it.

**The framework shifts us from simply delivering training to investigating the conditions, contributors, and constraints that shape performance.**



## L&D Detective® Workplace Performance Investigation Framework

The Workplace Performance Investigation Framework is designed to uncover the facts, clues, and evidence that reveal how various contributors influence workplace performance. By answering the questions in this framework, we gain clarity on business goals, human performance factors, and the conditions that impact outcomes. This framework provides a structured approach for investigating performance, ensuring that decisions are informed by evidence rather than assumptions.

The framework takes a performance-first approach, ensuring that business and human performance are evaluated within the broader workplace performance ecosystem.

## Workplace Performance Investigation Framework

Business Performance	Human Performance
What is the business goal?	Whose performance is needed to achieve the business goal?
What is the opportunity to pursue or problem to solve?	What are the skills, capabilities, actions, and behaviors needed to achieve the business goal?
Is there a metric that monitors the business goal and if so, who owns it?	Where is human performance now compared to where it needs to be?
What is the directional goal for the metric (move or maintain)?	Is the goal maintaining or moving human performance?
Is there a metric that influences the target metric's movement or stability and if so, who owns it?	What has potential to threaten human performance?
Who is contributing to the business goal, and how?	Are there plans for contributions that influence human performance?

The Workplace Performance Investigation Framework examines how individual and team behaviors influence business performance and identifies key metrics for success. A common challenge in assessing performance impact is the lack of proactive planning, but this framework closes that gap by considering measurement from the start. It provides a structured way to investigate workplace performance, ensuring that decisions are guided by facts.

Note: The questions in this framework are written in performance language to support clarity and alignment. You can tailor the wording to better reflect your organization's voice or culture. Just be careful not to change the intent behind the questions. The goal is to uncover facts, clues, and evidence, not assumptions, about business and human performance.

## Investigating Business Performance

The questions for business performance uncover what drives business goals. As an impact investigator, your role is to analyze business priorities, challenges, and opportunities beyond surface-level beliefs. This structured approach aligns workplace performance decisions with strategic objectives by clarifying business goals, key metrics, and the focus on improvement or stability. Identifying contributors, defining performance indicators, and identifying signals for impact strengthens decision-making and collective contributions.

The six questions in this section drive a focused investigation, ensuring business performance insights are intentional, targeted, and firmly rooted in evidence.

### What is the business goal?

Components	Description
Investigate	Define the organization's primary objective or desired outcome.
Insight	Identifies what success looks like for the organization and provides direction for performance expectations.
Intention	Establishing the business goal creates a clear target and focus for all subsequent actions, ensuring alignment with strategic priorities and providing a foundation for evaluating outcomes.
Interpret	Understanding the business goal is essential for any workplace performance investigation. Without clarity on what the organization is trying to achieve, it is difficult to assess performance drivers and contributors. A business goal should be measurable, such as "Increase market share by 5 points" or "Maintain customer service experience scores at 90% favorability." Vague goals like "Decrease errors" or "Improve quality" lack clear benchmarks for success. A quantifiable metric ensures impact can be evaluated fairly and objectively.



## What is the opportunity to pursue or problem to solve?

Components	Description
Investigate	Determine the business challenge or opportunity that requires performance to be improved or maintained.
Insight	Provides context for the business goal by clarifying whether an issue needs to be resolved or an opportunity is driving action.
Intention	Ensures clarity on the reason for the performance investigation, whether it is a challenge that needs to be addressed or an opportunity for growth, efficiency, or innovation.
Interpret	Defining the challenge or opportunity helps determine priorities and where focus should be placed. This question frames the purpose of the business goal and ensures that performance-related decisions are based on clear organizational needs rather than assumptions.

## Is there a KPI that monitors the business goal and if so, who owns it?

Components	Description
Investigate	Identify the key performance indicators (KPIs) that measure progress toward the business goal.
Insight	Ensures that performance is tracked using reliable metrics that provide meaningful insights into progress and success.
Intention	Establishing clear metrics provides a tangible way to measure movement toward or maintenance of business goals. Without defined metrics, performance assessments may be subjective or inconsistent.
Interpret	Data-driven decision-making is essential for detecting signals of impact. Identifying KPIs ensures that business performance can be evaluated accurately. Examples of business performance metrics include production, sales, quality, market share, customer satisfaction, speed, cycle time, and order fulfillment. These metrics offer objective data points for assessing whether business goals are being met.

## Is there a metric that influences the target metric's movement or stability and if so, who owns it?

Components	Description
Investigate	Identify any metric(s) that impacts the target metric's movement or stability.
Insight	Helps map interdependencies between key performance indicators and reveals how different factors influence business outcomes.
Intention	Acknowledging influencing metrics provides a more complete view of how various contributors interact to achieve the primary business goal.
Interpret	Business performance is often influenced by multiple metrics rather than a single data point. Identifying supporting metrics ensures a broader understanding of what contributes to success and provides a more comprehensive view of performance.

## Who is contributing to the business goal, and how?

Components	Description
Investigate	Identify all stakeholders and their roles in achieving the goal, ensuring that contributors from across the organization are part of the broader performance ecosystem.
Insight	Reinforces alignment and accountability across all contributors, recognizing that success depends on multiple teams and factors working together toward a shared objective.
Intention	Identifying contributors clarifies the collective effort required to achieve business goals and ensures collaboration across relevant teams and departments.
Interpret	Achieving business goals is a shared responsibility. Identifying contributors helps ensure that all relevant teams are recognized for their role in performance. This perspective supports a collective approach to workplace performance, reinforcing that business goals are achieved through multiple inputs rather than a single solution.

## Business Performance Question Summary

The questions for business performance focus on identifying the right contributors, clarifying goals, and determining whether key performance indicators should focus on improvement or stability. By systematically gathering facts, clues, and evidence, impact investigators ensure that workplace performance is examined within the broader business ecosystem. Before identifying potential solutions, it is essential to first explore business priorities, challenges, and opportunities. Asking the right questions provides clarity, aligns performance-related decisions with business needs, and enables a more strategic approach to achieving measurable impact.

## Investigating Human Performance

In the prior section, we examined questions for business performance. In this section, we'll examine questions for human performance. The questions for human performance uncover what drives individual and team effectiveness. As an impact investigator, your role is to look beyond assumptions and identify the capabilities, behaviors, and conditions necessary for success. This structured approach clarifies expectations, identifies barriers, and determines whether the focus is on improvement or stability. By identifying who is responsible for key outcomes and what influences human performance, we ensure that workplace contributions are aligned with business needs. The six questions in this section drive a structured investigation, ensuring that decisions are strategic, purposeful, and capable of producing measurable impact.

## Whose performance is needed to achieve the business goal?

Components	Description
Investigate	Identify the individuals, roles, or teams that are critical for achieving the business goal.
Insight	Determines whose expertise, capabilities, and actions influence workplace performance outcomes.
Intention	Clarifying who contributes to performance helps define priorities and ensures alignment with business needs.
Interpret	Identifying the target audience gives insight into unique dynamics and needs, for example, tenure, language, and cultural differences.

## Where is human performance now compared to where it needs to be?

Components	Description
Investigate	Assess whether there is a gap between current and desired performance or if stability needs to be maintained.
Insight	Establishes a baseline for measuring progress or sustaining consistency.
Intention	Ensures that decisions are based on objective evidence rather than assumptions or perceptions.
Interpret	Identifying where performance is versus where it needs to be provides a fact-based approach to evaluating workplace performance and alignment with business goals

## What are the skills, capabilities, actions, and behaviors needed to achieve the business goal?

Components	Description
Investigate	Define the competencies required for success and the specific performance expectations.
Insight	Translates business requirements into human performance needs and expectations.
Intention	Establishing clear performance expectations ensures alignment with business goals and provides a measurable structure for evaluating performance.
Interpret	Understanding required performance helps determine whether individuals have what they need to succeed and identifies areas where additional support may be necessary.

## Is the goal maintaining or moving human performance?

Components	Description
Investigate	Determine whether the focus is on improving performance or sustaining excellence.
Insight	Aligns performance-related decisions with the broader business strategy.
Intention	Differentiating between improvement and stability ensures that actions align with expectations for growth or consistency.
Interpret	Understanding whether performance should change or remain steady helps ensure that workplace initiatives are purposeful and effectively positioned.



## What has potential to threaten human performance?

Components	Description
Investigate	Identify barriers such as lack of resources, tools, or motivation that may impact workplace performance.
Insight	Recognizes risks and obstacles that could prevent employees from achieving performance expectations.
Intention	Addressing potential threats proactively ensures that contributors have the conditions necessary to sustain or improve performance.
Interpret	Acknowledging and mitigating risks allows for better alignment between performance requirements and the workplace environment.

## Are there plans for contributions that influence human performance?

Components	Description
Investigate	Identify factors such as process improvements, technology, bonuses, incentive programs, role restructuring, etc. that impact employee performance.
Insight	Ensures that workplace initiatives complement other contributions that support human performance.
Intention	Recognizing how multiple factors interact to influence workplace performance creates a holistic approach to achieving business goals.
Interpret	Understanding broader contributions ensures that workplace performance strategies are aligned with collective efforts, reinforcing a shared commitment to achieving business goals.

## Human Performance Questions Summary

The questions for human performance help impact investigators focus on the critical elements that influence workplace success. Before identifying potential solutions, it is essential to first examine the human factors that drive performance. This means determining who contributes to performance outcomes, what skills and behaviors are required, and what barriers or enablers exist. By asking the right questions, we ensure that workplace performance strategies are aligned with business goals and effectively support workforce success.

## Workplace Performance Investigation: The Impact Investigator's Secret Sauce for Alignment

The **Workplace Performance Investigation Framework** is the key to solving the mystery of what drives workplace performance. Instead of jumping to conclusions, impact investigators use this framework to uncover the facts, clues, and evidence behind business goals and human performance. By focusing on discovery rather than what we believe, we stay aligned with the realities of workplace success and ensure that decisions are guided by truth rather than guesswork.

The framework is a powerful solution for performance consulting, helping investigators examine workplace challenges from all angles. It ensures that business priorities and human performance factors are thoroughly investigated, revealing the full picture of what influences results. Whether performance needs to be improved, maintained, or stabilized, the framework keeps the investigation focused on the right questions, leading to informed decisions about what actions will have the most impact.



If training and learning are appropriate contributions to workplace performance, the framework ensures alignment with business goals. As a profession, we emphasize alignment, but without structured investigation, alignment remains a theory rather than a practice. The Workplace Performance Investigation Framework ensures that decisions are based on clear evidence and that solutions, such as training, technology, or process improvement, are chosen for their relevance and impact. This approach is what efforts for alignment looks like.

## Operationalizing Impact with the Workplace Performance Investigation Framework

The Workplace Performance Investigation Framework is more than a set of questions. It is a performance needs analysis that transforms how organizations approach training and learning. By integrating this structured, scalable, and repeatable process into training intake, we move beyond traditional training needs analyses that focus on assumptions and logistics. Instead, we investigate workplace performance needs to ensure training and learning solutions align with measurable business and human performance outcomes when training and learning are the right solutions.

Operationalizing this framework takes time and commitment. Gathering answers requires a shift in approach, as it moves beyond simply fulfilling training requests to investigating performance needs. Some may initially question why the process is necessary or feel unaccustomed to answering these types of questions. However, as the framework becomes standard practice, training requestors, and L&D, will appreciate its value. The framework ensures that every training request is grounded in a

**The framework ensures that every training request is grounded in a structured performance investigation.**



structured performance investigation. This creates greater efficiency, streamlines decision-making, and standardizes how training aligns with business goals.

Sustaining this approach drives long-term success. Over time, the framework not only aligns training with business priorities but also creates success stories that prove its effectiveness. These examples can reinforce the power of structured performance investigations in driving measurable workplace impact. When this framework becomes the standard, impact is no longer reactive. It becomes operationalized, making performance-focused decision-making an intentional and essential part of the process.

## Collecting Facts, Clues, and Evidence for the Workplace Performance Investigation Framework

A structured workplace performance investigation requires a consistent approach for collecting the facts, clues, and evidence to make informed decisions. There are five options for collecting the information needed to conduct a workplace performance investigation: face-to-face meetings, virtual meetings, online forms, email

communication, or a hybrid approach that combines multiple methods. Each method has advantages and challenges where selecting the right approach depends on the organizational context, culture, stakeholder availability, and efficiency needs.

Face-to-face and virtual meetings offer the benefit of getting all key stakeholders together at the same time, reducing the need for multiple meetings. The online form provides a standardized way for training requestors to submit information and allows for long-term analysis of training request trends. Email communication can be useful for flexibility, but it may result in fragmented responses. A hybrid approach integrates multiple methods, maximizing efficiency while ensuring comprehensive data collection.

The table below outlines the pros and cons of each method:

Methods	Pros	Cons
Face to Face Meetings	Immediate collaboration & discussion Ability to clarify details in real-time Stronger engagement & alignment	Scheduling challenges Requires physical presence Time-intensive
Virtual Meeting	Allows remote participation Reduces travel constraints Can be recorded for reference	Technology issues may arise Engagement levels may vary Dependent on the availability of participants
Online Form	Standardized data collection Allows trend analysis over time Convenient for requestors to complete at any time	Lacks immediate discussion Responses may lack depth Some requestors may not complete thoroughly
Email	Provides flexibility for responses Good for follow-ups and documentation Works well for simple requests	Responses may be fragmented No immediate clarification Time delays in gathering all responses

<b>Hybrid Approach</b>	Maximizes flexibility Tailored approach based on needs Combines strengths of multiple methods	Can be complex to coordinate Requires clear protocols Potential for inconsistencies in responses
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Operationalizing the **Workplace Performance Investigation Framework** through these methods ensures impact investigation becomes a standard part of the training intake process. While initial resistance may arise when introducing this structured approach, over time, stakeholders will recognize its value in aligning training with workplace performance needs.

By embedding this process into the organization’s workflow, impact investigators create a sustainable, consistent system for proactive planning for impact and measuring success. The success stories generated through this approach will further reinforce the importance of conducting thorough workplace performance investigations and demonstrating how training and learning contribute to business performance.



## Case Study: Total Tech & Talent

Total Tech & Talent is a global SaaS (software as a service) company that develops cutting-edge solutions for HR functions. With 6,000 employees worldwide, it is the leader in HR solutions. Recently, the company developed an AI-powered feature called Predictable Talent Plug-In, a premium feature for its standard platform that clients can purchase at an additional cost.

The company's Full Client Status (FCS) metric tracks the percentage of potential clients converted to full client status. The business goal for FCS is 70%, and associate consultants, responsible for scoping new clients and adding them to the revenue pipeline, are currently exceeding this goal at 75%. As the company prepares to launch the Predictable Talent Plug-In, leadership wants to ensure that the introduction of this AI-powered solution does not interfere with associate consultants' ability to maintain the FCS goal of 70%. Although performance is currently above target, the focus is on maintaining performance rather than improving it.



The Global Consulting Director has requested a training program for associate consultants. The details of this training request will be revealed through the Workplace Performance Investigation Framework for Total Tech & Talent that we'll examine next.



## Workplace Performance Investigation Framework Results for Total Tech & Talent

The Total Tech & Talent L&D team conducted a workplace performance investigation using the Workplace Performance Investigation Framework in response to the training request. Some questions were answered by the Global Consulting Director, who submitted the training request, and other questions were answered by different stakeholders, partners, and contributors across the business. The results are below:





## Business Performance Questions & Answers

Question	Answer
What is the business goal?	Maintain FCS at 70%.
What is the opportunity to pursue or problem to solve?	We are launching a new AI-powered feature called the Predictable Talent Plug-In. Leadership wants to ensure that its introduction does not interfere with associate consultants' ability to maintain the FCS target goal of 70%.
Is there a metric that monitors the business goal and if so, who owns it?	The metric FCS (Full Client Status) measures the percentage of potential clients that convert to full client status. The Business Analytics team owns the metric.
What is the directional goal for the metric (move or maintain)?	The goal is maintaining the metric at 70%.
Is there a metric that influences the target metric's movement or stability and if so, who owns it?	There is no additional metric that directly influences the movement or stability of FCS.
Who is contributing to the business goal, and how?	<p>The Compensation &amp; Benefits team is exploring bonus incentives for associate consultants.</p> <p>The Sales Innovation team is creating video simulations of best-practice client discussions for associate consultants.</p> <p>The Product Innovation team is setting up hands-on labs for associate consultants to experiment with the Predictable Talent Plug-In.</p> <p>The Knowledge Management team is developing a knowledge portal for the Predictable Talent Plug-In.</p> <p>The Marketing team is creating a promotional campaign for the Predictable Talent Plug-In.</p>
What is the directional goal for the metric (move or maintain)?	The goal is maintaining the metric at 70%.





## Human Performance Questions & Answers

Question	Answer
Whose performance is needed to achieve the business goal?	Associate consultants are the target audience. These consultants operate globally, and in some regions, English is not their primary language. The average tenure is 3.5 years. The associate consultant role is an entry level position.
What are the skills, capabilities, actions, and behaviors needed to achieve the business goal?	<p>Effectively communicate the value proposition of the Predictable Talent Plug-In to potential clients, ensuring clarity and confidence in discussions.</p> <p>Navigate client objections by addressing concerns related to the product's features, pricing, and implementation challenges.</p> <p>Guide potential clients through the decision-making process by asking the right questions and aligning the Predictable Talent Plug-In with their specific business needs.</p>
Where is human performance now compared to where it needs to be?	There is no performance gap because the target goal for the FCS metric is currently above goal. Associate consultants are exceeding performance expectations with an FCS of 75%; 5% above goal the 70% goal.
Is the goal maintaining or moving human performance?	The goal is maintaining associate consultants' performance at its current level to ensure continued success with the FCS metric.
Who is contributing to the business goal, and how?	<p>Uncertainty about Predictable Talent Plug-In features, leading to hesitation in client discussions.</p> <p>Resistance to change, as some associate consultants may feel the new feature disrupts their established workflow.</p> <p>Associate consultants may be hesitant to fully embrace the new feature if they perceive AI as a potential threat to their role leading to reluctance in promoting it to clients.</p>
Are there plans for contributions that influence human performance?	<p>Video-based simulations demonstrating best-practice client discussions.</p> <p>Hand-on labs where associate consultants can experiment with the new feature.</p> <p>Knowledge portal with detailed resources on the Predictable Talent Plug-In.</p> <p>Bonus incentives to encourage engagement with the plug-in without impacting conversion rates.</p>



## Case Study Review

Our investigation into Total Tech & Talent's business goal demonstrated the power of the Workplace Performance Investigation Framework as a structured approach for uncovering workplace conditions that influence performance. Rather than defaulting to a solution, we followed the facts, clues, and evidence to reveal what impacts the Full Client Status (FCS) metric. This methodical investigation gave us a clear understanding of the goal, which is maintaining the FCS metric at 70%. It also identified how associate consultants and supporting teams contribute to sustaining this target.

The framework helped us examine potential threats to performance, such as uncertainty about the Predictable Talent Plug-In and resistance to change. It also revealed the broader contributions influencing performance, including video simulations, hands-on labs, a knowledge portal, and a marketing campaign. These findings highlight the importance of viewing workplace performance within the full ecosystem rather than isolating any single factor.

By following an investigative approach, we ensured that our recommendations are grounded in evidence rather than assumptions. The Workplace Performance Investigation Framework transformed our findings into facts, giving us the confidence to make informed decisions. The results of this case study serve as a clear example of how a structured investigation leads to meaningful insights and a strategic path forward.



## When Training and Learning Is Not the Solution

The Workplace Performance Investigation Framework helps determine when training and learning contribute to workplace performance and when they do not. Organizations often default to training as a solution for performance issues, assuming that employees lack the necessary skills or knowledge. However, a thorough investigation can reveal other root causes, such as unclear expectations, inadequate tools, policy gaps, or leadership challenges. In these cases, training is not the answer because employees already have the necessary skills but are hindered by systemic barriers that prevent them from using their skills and capabilities in ways that drive business performance.

Consider a customer service team struggling with slow response times and declining satisfaction scores. Training may seem like the logical solution, but an investigation might uncover that outdated systems, inefficient workflows, or unrealistic performance targets are the real problem. Similarly, when organizations face low employee engagement and high turnover, leadership training is often requested to improve managerial effectiveness. However, the issue may stem from excessive workloads, lack of psychological safety, or unrealistic expectations. In both cases, the right solution involves operational changes, policy updates, or leadership accountability, not training. Training may play a role later, but only after these systemic issues are addressed.

The Workplace Performance Investigation Framework ensures that the right solution is applied to the right problem. Not all performance challenges stem from a lack of skills or knowledge. In many cases, process improvements, policy changes, or leadership interventions are more effective than training. By identifying the true performance drivers, organizations can avoid misapplying training and focus on solutions that have power and potential for lasting impact.

## Chapter Review

This chapter introduced the Workplace Performance Investigation Framework as a structured approach for uncovering the factors that drive workplace performance. Instead of assuming training is the answer, this framework helps impact investigators ask the right questions to determine whether training is needed or if other interventions are required. The framework segments investigation into business performance and human performance, ensuring alignment with measurable business goals. The case study illustrated how this framework can be applied in real-world scenarios, highlighting its effectiveness in guiding evidence-based decision-making. By using this framework, impact investigators ensure that every performance solution is intentional, strategic, and based on factual insights.

## Impact Investigator Actions

1. Apply the Workplace Performance Investigation Framework to training requests in your organization.
2. Gather evidence rather than relying on assumptions about performance needs.
3. Engage stakeholders to answer key business and human performance questions.
4. Identify metrics that signal workplace performance impact.
5. Transform training requests into opportunities for strategic performance consulting using the framework.

## What's Next?

Now that we have a structured way to investigate performance, how do we measure impact effectively? The next chapter reveals the ultimate clue for impact, business performance metrics. Get ready to track performance signals, interpret metrics, and discover how data strengthens our case for impact.

# 04

## BUSINESS PERFORMANCE METRICS: THE ULTIMATE CLUE FOR IMPACT

### Chapter Preview

Every impact investigator knows that data provides the most compelling clues for measuring contribution. Without it, we are left with speculation. In this chapter, we will investigate:

1. Why business performance metrics provide the strongest evidence for impact.
2. The limitations of LMS data and survey responses in measuring real impact.
3. The role of quantitative and qualitative data in performance investigations.
4. How to validate training requests with business data.
5. Strategies for overcoming challenges in accessing business performance data.

### Tracking the Signals: Business Metrics as Evidence

As impact investigators, we rely on data as the strongest, most credible, and most reliable signal for investigating the effectiveness of contributions in the workplace performance ecosystem. Every business function plays a role in driving outcomes, and training is just one of many contributors. The key to uncovering progress is monitoring the business metrics that indicate business performance. These metrics serve as factual evidence, offering insight into whether workplace contributions are leading to measurable performance improvements, sustaining current performance levels, or preventing declines.



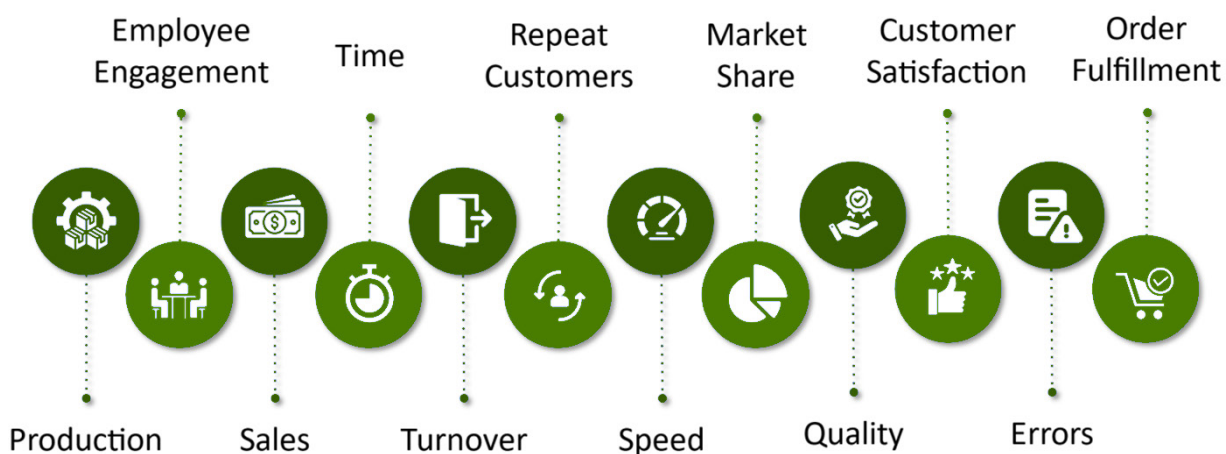


The most credible case for learning's contribution is grounded in facts, not feelings. It is less about perceptions and more about performance. To build trust and demonstrate value, we need business metrics that reveal training's influence on workplace results.

## Breaking the Habit: Rethinking LMS Data and Surveys

LMS data and survey responses have long been relied on to measure impact, but they do not provide direct evidence of training's influence on workplace performance. LMS data is helpful for tracking usage patterns, completion rates, and engagement levels and surveys capture perceptions, sentiment, and self-reported behavior. These insights add context, but they do not confirm whether training has actually influenced performance.

The strongest and most credible signal of impact in the workplace performance ecosystem is a business metric tied to a specific goal. In the Total Tech & Talent case study, the FCS business performance metric serves this role by tracking associate consultants' success in converting potential clients to full client status. While data, such as surveys, can gauge perceptions, business performance metrics like FCS offer concrete evidence of training's contribution, reinforcing the importance of measuring impact with objective data.



To build a compelling case for impact, organizations must prioritize business performance metrics over indirect indicators like sentiment or engagement. LMS and survey data can support the story, but the foundation for proving impact lies in hard business results. Training should be evaluated within the broader performance ecosystem, ensuring that its role is assessed alongside other workplace factors influencing the business performance metric.

## Quantitative vs. Qualitative Data

Understanding the differences between quantitative and qualitative data is essential for impact investigators seeking to build a strong case for training's contribution to workplace performance. The following tables provide a structured comparison of these two data types, highlighting their characteristics, sources, advantages, and limitations. The first table outlines the defining features of quantitative and qualitative data, illustrating how each serves a unique purpose in measurement and analysis. The second table identifies key data sources for both types, distinguishing between structured numerical metrics and descriptive, experience-based insights. The third table compares their strengths and challenges, showing how each type of data contributes to understanding impact from different perspectives.

## Characteristics of Quantitative and Qualitative Data

Feature	Quantitative Data	Qualitative Data
Nature	Numerical and measurable	Descriptive and non-numerical
Purpose	Provides statistical evidence of trends, patterns, and relationships	Provides insights into experiences, opinions, and perceptions
Complexity	Ideal for tracking performance outcomes over time	Captures complexity, context, and nuances that numbers alone cannot reveal
Data Sources	Includes KPIs, company reports, performance metrics, and structured survey responses	Includes interviews, focus groups, open-ended survey responses, and observations
Usefulness	Useful for making data-driven decisions and validating training's impact on business performance	Useful for exploring new ideas and understanding the reasons behind actions
Measurement	Objective and easier to compare across groups	Subjective and harder to quantify, making it less ideal for direct performance measurement

## Sources of Quantitative and Qualitative Data

Feature	Quantitative Data	Qualitative Data
Performance Metrics & KPIs	Productivity rates, efficiency scores, revenue growth	N/A
Company Reports & Financial Data	Revenue, profit margins, retention rates, sales numbers	N/A

<b>System-Generated Data</b>	Dashboards, workforce analytics reports, transaction logs, customer satisfaction scores	N/A
<b>Experiments &amp; A/B Testing</b>	Controlled studies with measurable outcomes	N/A
<b>Interviews</b>	N/A	One-on-one conversations providing detailed insights into experiences and perceptions
<b>Focus Groups</b>	N/A	Group discussions exploring opinions, motivations, and behaviors
<b>Open Ended Surveys</b>	N/A	Text-based responses offering descriptive feedback
<b>Observations</b>	N/A	Notes on behaviors and interactions in real-world settings
<b>Case Studies</b>	N/A	In-depth examinations of specific individuals, teams, or situations

## Strengths and Limitations of Quantitative and Qualitative Data

Feature	Quantitative Data	Qualitative Data
<b>Nature</b>	Objective, measurable, structured	Subjective, exploratory, descriptive
<b>Purpose</b>	Measuring numerical trends, performance, and impact	Understanding behaviors, motivations, and experiences
<b>Data Format</b>	Numbers, statistics, KPIs, calculations	Words, narratives, interviews, observations
<b>Data Sources</b>	Allows for trend analysis, easy to compare	Provides rich insights, captures complexity
<b>Limitations</b>	May lack depth, does not explain 'why' on its own	Difficult to quantify, requires interpretation

Both quantitative and qualitative data provide valuable insights in investigating impact. Quantitative data, particularly business performance metrics, offers the strongest, most credible, and most reliable signal for examining collective contributions to business performance and business goals. While qualitative data provides context by capturing behaviors, motivations, and experiences, business performance metrics serve as the primary indicator of measurable outcomes. By focusing on quantitative data as the foundation for impact investigation, impact investigators ensure a fact-based approach to examining workplace performance.

## Validating Training Requests with Data and Facts

An impact investigator must uncover the truth behind a training request. The Workplace Performance Investigation Framework provides a structured way to examine the facts, clues, and evidence that support or challenge the request. Business metrics, measures, and KPIs serve as critical signals, offering objective proof of workplace performance conditions. The framework helps reveal whether training is an appropriate contribution, but it is up to the investigator to dig deeper and analyze what sits behind the request. The first step in any investigation is to assess the evidence:

- Is it anecdotal, based on someone's opinion or a widely held belief?
- Is it backed by a tangible business metric, measure, or KPI?
- Is the issue affecting a broad group or just a few individuals?
- What concrete data validates that training is necessary?

Anecdotal evidence provides context, but business performance data is objective proof. Feelings shape perceptions, but facts establish credibility. Without a measurable business metric, tracking impact is difficult. The Total Tech & Talent case study demonstrates this by examining whether FCS data signaled a performance gap before assuming training was needed. When business metrics are unavailable, qualitative data can highlight patterns and provide contextual insights. However, it should support quantitative proof rather than serve as a substitute.

**We use business performance metrics as signals for impact but we do not own these metrics.**



Not every performance mystery comes with a ready-made metric. There are situations where a business performance measure doesn't exist. There are also times when existing metrics provide only a partial view of the performance story. That's when creating a new metric may be necessary. While L&D owns LMS and survey data,

business performance data is outside our scope. We use business performance metrics as signals for impact but we do not own these metrics. The responsibility for defining, creating, and tracking those metrics belongs to the business. As impact investigators, we play a valuable role by guiding measurement strategy and recommending what to measure, but the business must lead the way in monitoring and validating the metric to ensure accuracy, accountability, and long-term commitment.

## No Access, No Insight: Overcoming Business Data Access Challenges

A common challenge for L&D practitioners is limited access to business performance data, making it difficult to measure collective contribution. Organizational structures, security policies, and siloed data often create barriers. The issue isn't just willingness but a lack of clear pathways for collaboration. Instead of seeing this as a roadblock, L&D can focus on building relationships with business performance data owners, demonstrating the value of data-driven decisions, and gradually securing access to business performance metrics.

### Why Is Business Data a Challenge for L&D?

Several factors may prevent L&D from getting access to business performance data including;

- **Data silos and departmental barriers** – Many organizations store data across multiple systems, often limiting access to specific departments. L&D teams may be left out unless they actively engage with data owners.
- **Privacy, compliance, and security concerns** – Business performance data often contains sensitive information. Some organizations enforce strict access controls to protect confidentiality, which can prevent L&D from obtaining key insights.
- **Lack of business alignment** – When L&D operates separately from core business functions, leaders may not recognize the need to share performance data. Without clear alignment to business priorities, access remains restricted.
- **Limited data literacy** – Some L&D teams may not be comfortable working with business metrics, making it harder to justify their need for access. Without strong analytical skills, even available data may go underutilized.

## Overcoming the Access Challenge

Rather than viewing data limitations as obstacles, L&D practitioners can use these strategies to empower themselves and gain the access needed for meaningful impact measurement:

- **Establish relationships with data owners** – Business metrics are typically managed by finance, sales, operations, HR, or the analytics team. Building partnerships with these teams can create opportunities for data sharing and collaboration.
- **Frame the request around business goals** – Instead of simply asking for access, position the request in terms of business impact. For example, saying *“We want to track whether training supports improved sales conversions”* is more persuasive than *“We need access to sales data.”*
- **Start small and build trust** – If full access isn’t possible, request specific reports or trends over time. Demonstrating responsible use of data can help gain credibility and unlock more access.
- **Enhance data literacy within L&D** – Learning how to interpret and analyze business metrics allows L&D to have more meaningful conversations with stakeholders and data owners.
- **Collaborate with IT and legal teams on compliance** – If security concerns limit access, work with IT and legal teams to define appropriate, compliant ways to obtain relevant data.

Gaining access to business data is possible with the right approach. By fostering collaboration, aligning with business goals, and demonstrating the value of data-driven decisions, L&D practitioners can build strong partnerships that lead to greater visibility. With persistence and strategic action, unlocking the insights needed for meaningful impact measurement becomes not just a possibility, but a reality.





## Case Study: Total Tech & Talent Business Performance Metric

In the Total Tech & Talent investigation, our measurement mystery is centered around one signal for impact: the Full Client Status (FCS) metric. The business goal is maintaining FCS at or above 70%. This is a quantitative metric that tracks conversion of clients in the pipeline into full, active clients. Unlike LMS data or survey responses, FCS is not about perception or participation. It provides objective, numeric evidence of business performance and serves as a clear indicator of whether the business is moving forward, holding steady, or falling behind.

70%

As we dig deeper into the case, we discover that FCS is an independent metric. There are no other data sources or KPIs influencing its movement or stability. That gives us a unique opportunity to use FCS as a focused clue for examining the effect of collective contributions within the workplace performance ecosystem. Any change in the metric is a signal. It gives us insight into how all the performance contributors, including training and learning, are aligning their efforts to support the business goal.

FCS also reminds us that impact doesn't always show up right away. Like many business performance metrics, this one must be tracked over time. There may not be an immediate spike or dip, but that doesn't mean performance isn't shifting. Everyone with a role in supporting the business goal has a vested interest in this metric. Each contributor is expected to take purposeful action that helps maintain or improve the metric. Performance is collective. The results we see from the FCS metric reflect the combined efforts of collective contributions in the workplace performance ecosystem.

## Chapter Review

This chapter emphasized that business performance metrics are the most credible and reliable source of evidence for impact investigation. It distinguished between LMS data, surveys, and business performance metrics, reinforcing that only business performance data provides direct insight into workplace performance. Quantitative data offers measurable proof of impact, while qualitative data adds context and deeper understanding. The chapter also highlighted common challenges in accessing business performance data and provided actionable recommendations for overcoming these barriers. By integrating data-driven insights into investigations, impact investigators strengthen their ability to make informed recommendations that align training with real business needs.

## Impact Investigator Actions

1. Identify key business performance metrics that signal workplace impact.
2. Examine whether current business metrics reveal impact or if new ones need to be created.
3. Work with data owners in your organization to access performance metrics.
4. Prioritize metrics that are quantifiable and tied directly to business goals.
5. Align impact measurement with business priorities to ensure relevance and credibility.

## What's Next?

After confirming that training is the right solution, how do we ensure it is designed for measurable impact? The next chapter introduces the Performance Impact Blueprint. This structured plan helps impact investigators align learning solutions with business and human performance goals.

# 05

# PERFORMANCE IMPACT BLUEPRINT

## Chapter Preview

Investigating impact is only the beginning. We need a structured plan that connects investigative findings to action. In this chapter, we will examine:

1. How the Performance Impact Blueprint transforms investigation findings into strategy.
2. The key components of the blueprint, including business goals and human performance requirements
3. The importance of identifying business goal contributors beyond L&D.
4. How to mitigate risks that could prevent performance impact.
5. How the blueprint ensures alignment between training, business goals, and measurement.

## The Blueprint for Action: Connecting Investigation to Strategy

An impact investigator's job is more than uncovering facts. The real challenge is turning those facts into a structured plan that we can use to make recommendations and stakeholders can use to make informed decisions. The Performance Impact Blueprint transforms findings from the Workplace Performance Investigation Framework into a clear and actionable roadmap. It compiles the facts, clues, and evidence into a format that business leaders can use to assess workplace performance conditions and decide on next steps.

The Performance Impact Blueprint is a critical tool for turning investigative findings into a clear, actionable plan. It highlights key information about business goals, human performance requirements, risks, and collective contributions. Rather than simply listing results from the workplace performance investigation, the blueprint translates those findings into focused insights that support informed decision-making and ensure alignment with workplace performance priorities.

Just as a detective uses case files to summarize an investigation, the Performance Impact Blueprint presents a complete picture of workplace performance. It helps impact investigators turn investigative insights into strategic recommendations.

## Breaking Down the Performance Impact Blueprint

Each section of the Performance Impact Blueprint is informed by the Workplace Performance Investigation Framework. Below is a breakdown of each section and how it connects to investigative findings.

### Performance Impact Blueprint

#### Business Goals

Represents the top-level business objective that workplace performance is expected to support.

- Identify the business goal revealed in your investigation.
- Confirm that the goal is measurable and time-bound.
- Use this goal as the anchor for aligning all performance and learning strategies.

#### Business Goals Context

Explains the reason this goal matters and what influences its achievement.

- Describe the business conditions, challenges, or opportunities related to the goal.
- Include relevant market, operational, or internal dynamics.
- Make sure the context supports urgency and relevance for performance action.

## Human Performance Requirements

Outlines what people need to do, demonstrate, or perform to achieve the business goal.

- List specific behaviors, skills, capabilities, and actions identified in the investigation.
- Avoid vague language like “know” or “understand”. Focus on what people must do.
- Make sure performance requirements align directly with achieving the business goal.

## Target Audience

Specifies whose performance needs to improve or be supported.

- Identify the job roles or teams responsible for performance.
- Consider the audience’s environment, demographics, and work context.
- Be precise so solutions are focused and relevant.

## Business Goal Contributors

### Team

### Contribution

Team Name

Specifies whose performance needs to improve or be supported.

- Identify cross-functional partners supporting the business goal.
- Clarify each team’s role and contribution.
- Reinforce that workplace performance is a collective effort.

#### Recommended L&D Contribution

Identifies what L&D will provide to support the human performance requirements.

- Recommend learning experiences, performance support, or coaching.
- Ensure contributions are practical and focused on enabling specific behaviors.
- Keep alignment between L&D's role and the larger workplace performance ecosystem.

## Potential Performance Risks

### Potential Risk

### Response

#### Describe the Risk

Reveals obstacles that could interfere with performance success.

- Identify risks surfaced during the investigation.
- Describe how each risk will be addressed and why that matters
- Proactively plan to mitigate risks before they affect results.

## Impact Measurement

Defines how progress and success will be tracked using business-relevant data.

- List the business performance metrics that will be monitored.
- Identify who owns the data and how it will be accessed.
- Make sure measures directly reflect the business goal and human performance outcomes.

The Performance Impact Blueprint is the case file every impact investigator needs when the investigation reveals that training and learning can contribute to workplace performance. It captures the facts, clues, and evidence uncovered during the workplace performance investigation and turns them into a structured, strategic plan. I use Performance Impact Blueprints to present results for my investigation to training requestors, showing how learning aligns goals, supports human performance, and addresses real risks. The blueprint becomes the foundation for meaningful conversations, where we shift from simply delivering training to designing learning with purpose, clarity, with potential and power for measurable performance impact.

**I use Performance Impact Blueprints to present results for my investigation to training requestors...**



## Case Study: Performance Impact Blueprint for Total Tech & Talent

The Performance Impact Blueprint for Total Tech & Talent demonstrates how the Workplace Performance Investigation Framework informs each section of the blueprint. In this case, the investigation revealed that training and learning have the potential and power to contribute to the business goal. The findings pointed to specific human performance requirements that align with measurable outcomes, creating a clear opportunity for L&D to support the business goal. Let's take a look:

### Performance Impact Blueprint

#### Business Goal

Maintain FCS (Full Client Status) at 70%.

#### Business Goal Context

We are launching a new AI-powered feature called the Predictable Talent Plug-In. Leadership wants to ensure the launch does not interfere with the target FCS target goal of 70%.



## Human Performance Requirements

- Effectively communicate the value proposition of the Predictable Talent Plug-In to potential clients, ensuring clarity and confidence in discussions.
- Navigate client objections by addressing concerns related to the product's features, pricing, and implementation challenges.
- Guide potential clients through the decision-making process by asking the right questions and aligning the Predictable Talent Plug-In with their specific business needs.

## Target Audience

Associate consultants

## Business Goal Contributors

Team	Contribution
Compensation & Benefits	Bonus incentives for associate consultants.
Sales Innovation	Video simulations of best-practice client discussions for associate consultants.
Product Innovation	Hands-on labs for associate consultants to experiment with the Predictable Talent Plug-In.
Knowledge Management	Knowledge portal for the Predictable Talent Plug-In.
Marketing	Promotional campaign for the Predictable Talent Plug-In.
Recommended L&D Contribution	<b>Workshop</b> Equip associate consultants with confidence and skills to seamlessly integrate discussions about the Predictable Talent Plug-In into their client interactions without disrupting their sales process.

#### e-Learning

Provide ongoing reinforcement through microlearning simulations that help consultants navigate real-world client discussions with the new AI feature.

## Potential Performance Risks

### Potential Risk

### Response

Uncertainty about Predictable Talent Plug-In features, leading to hesitation in client discussions.

Develop an interactive product immersion experience where associate consultants can explore the Predictable Talent Plug-In in a hands-on environment before engaging with clients.

Resistance to change, as some associate consultants may feel the new feature disrupts their established workflow.

Conduct workflow integration sessions to help associate consultants see how the Predictable Talent Plug-In fits seamlessly into their existing sales process.

Associate consultants may be hesitant to fully embrace the new feature if they perceive AI as a potential threat to their role leading to reluctance in promoting it to clients.

Shift the narrative from AI as a competitor to AI as an enabler of consultant success.

## Impact Measurement

Business Analytics, Compensation & Benefits, Sales Innovation, Product Innovation, Knowledge Management, and L&D will meet weekly to monitor performance for FCS's target goal of 70%.

## Key Findings from the Workplace Performance Investigation Framework for Total Tech & Talent:

- The business goal is maintaining Full Client Status (FCS) at 70%.
- Associate consultants are the target audience for achieving this goal through client engagement.

- Performance risks include uncertainty about the new AI feature, resistance to change, and concerns about job security.
- Human performance requirements include communicating value, addressing objections, and aligning solutions with client needs.
- The business performance metric, Full Client Status (FCS), was identified as the key signal for tracking and measuring impact.

## How the Performance Impact Blueprint Was Used

- Organized findings from the investigation into a structured action plan for action.
- Aligned L&D's contributions with specific human performance requirements related to the business goal.
- Identified and documented cross-functional contributions to reinforce the collective impact on performance.
- Highlighted potential risks and outlined proactive solutions to mitigate them before implementation.
- Provided a clear, evidence-informed blueprint that supports confident, evidence-based decision-making for training and learning.

## Synthesizing Findings: Turning Insights Into Action

The Performance Impact Blueprint ensures that findings from the Workplace Performance Investigation Framework are compiled into a structured plan that stakeholders can use to make informed decisions. Just as an investigator compiles a case file, the blueprint presents findings in a format that turns insights into action. By using this approach, impact investigators ensure that every recommendation is strategic, intentional, and backed by evidence.

## Chapter Review

This chapter introduced the Performance Impact Blueprint as a structured tool for organizing investigative findings into an actionable plan. It emphasized that training and learning solutions must be intentionally designed to support measurable business and human performance outcomes. The blueprint ensures that all workplace performance contributors are identified, risks are addressed, and training aligns with business priorities. By using this tool, impact investigators provide a roadmap for success, ensuring that learning is not just delivered but actively contributes to business performance.

## Impact Investigator Actions

1. Use the Performance Impact Blueprint to structure findings from investigations.
2. Ensure that training and learning align with business and human performance goals.
3. Identify key business goal contributors who impact workplace performance.
4. Address potential risks that could hinder training effectiveness.
5. Collaborate with stakeholders to create a structured, measurable plan for impact.

## What's Next?

We now have a blueprint for aligning training with workplace performance. The next chapter explores how AI can assist impact investigators in the same way Dr. Watson assisted Sherlock Holmes. AI has the potential to assist with building the Performance Impact Blueprints by helping us analyze data, uncover insights, and strengthen our strategic approach. This is where technology meets investigation, adding a digital partner to our performance impact investigation work.

# 06

## AI-ASSISTED PERFORMANCE IMPACT BLUEPRINT

### Chapter Preview

AI is a powerful tool that can assist with creating Performance Impact Blueprints. It does not replace human judgment, but it can support impact investigators in structuring and organizing findings. In this chapter, we will explore:

1. How AI assists in performance investigation structuring.
2. The role of AI in identifying trends and patterns in workplace performance data.
3. How AI-generated insights support decision-making.
4. The limitations of AI and why human expertise remains essential.
5. Practical ways impact investigators can integrate AI into their investigative process.

### The Blueprint for Action: Connecting Investigation to Strategy

AI is your assistant in structuring and organizing the results of your workplace performance investigation. It does not replace your expertise, judgment, or investigative instincts. Instead, just as Dr. Watson assisted Sherlock Holmes, AI can assist with compiling results and making recommendations from your completed Workplace Performance Investigation Framework, organizing findings, and structuring a Performance Impact Blueprint aligned with business and human performance goals.

AI can process your completed Workplace Performance Investigation Framework to uncover patterns, identify key contributors, and generate structured insights that guide decision-making. The goal is not to generate training solutions in isolation but to align AI-assisted blueprints with performance-based evidence.

With AI as our investigative assistant, we'll explore how it helps transform workplace performance investigation results into a Performance Impact Blueprint, ensuring training solutions are directly tied to performance needs.

## Disclaimer: AI's Limitations

AI is a powerful tool, but it is not perfect. While it can assist in structuring findings, human expertise remains essential.

- AI does not think or reason like an impact investigator. It identifies patterns but lacks context awareness.
- Generated content may require refinement. AI outputs depend on the quality and clarity of your input.
- AI cannot replace human expertise. Investigators must validate all AI-generated recommendations.
- Results may also differ across AI platforms. Each platform is built with different models, training data, and design logic. Even if the prompt stays the same, outputs can vary depending on the platform used. Always review responses carefully to ensure they align with your performance investigation findings.

Approach AI with an investigative mindset. Probe, refine, and validate its recommendations just as you would examine any piece of evidence during a performance investigation. Instructions in this chapter are based on using ChatGPT (version 4 as of this writing), which is my personal preference and not an endorsement of the platform.

## Bringing AI Into Your Performance Impact Investigation

Let's explore how AI helps generate a Performance Impact Blueprint.

### Key Takeaways

Rather than viewing data limitations as obstacles, L&D practitioners can use these strategies to empower themselves and gain the access needed for meaningful impact measurement:

- AI can analyze your completed Workplace Performance Investigation Framework and organize the findings into a structured Performance Impact Blueprint.
- AI-assisted blueprints help align training and learning with business goals and human performance needs.
- AI accelerates the process of turning investigation results into actionable insights, saving time and increasing efficiency.
- AI supports your role as an impact investigator by enhancing accuracy, consistency, and scalability—without replacing your judgment.

With AI as our assistant, let's generate an AI-assisted Performance Impact Blueprint using the following step-by-step approach.

## Generating an AI-Assisted Performance Impact Blueprint

If you have not used AI before, no worries! In this section, we'll discover through a simple, step-by-step process how to get support from AI that helps you structure your Performance Impact Blueprint. This works best if you've already completed your Workplace Performance Investigation Framework. That's the foundation.

**You'll be asking AI to do three things:**

- Use your completed Workplace Performance Investigation Framework to create a Performance Impact Blueprint.
- Recommend training and learning contributions for the "Recommended L&D Contribution" section.
- Suggest a strategy for measuring performance for the "Impact Measurement" section.

### Step 1: Start a New Chat with AI

Open your preferred AI tool. I use ChatGPT, but you can use any AI platform that lets you upload documents and ask questions.

Start a new conversation.

Before you ask any questions, you need to attach your completed Workplace Performance Investigation Framework. In ChatGPT, click the "+" icon next to the message box and select your file to upload. This gives AI the information it needs to generate useful and relevant output.

### Step 2: Ask AI to Create the Performance Impact Blueprint

Once your file is uploaded, copy and paste this message into the chat:

"Act as a performance consultant. I'm sharing a completed Workplace Performance Investigation Framework. Please use it to create a Performance Impact Blueprint in the following order:

1. Business Goal
2. Business Goal Context
3. Human Performance Requirements
4. Target Audience
5. Business Goal Contributors
6. Recommended L&D Contribution
7. Potential Performance Risks
8. Impact Measurement

Please keep the language clear and business-focused. There's no need to format the output in a table. Just present each section with a clear label and the recommended content underneath."

## Step 3: Ask AI to Help with the L&D Contribution and Impact Measurement Sections

After AI generates the initial Performance Impact Blueprint, review it carefully.

If the "Recommended L&D Contribution" and "Impact Measurement" sections are missing or too vague, ask a follow-up question like this:

"Based on the results from the completed Workplace Performance Investigation Framework I shared, what training and learning contributions do you recommend for the Recommended L&D Contribution section of the Performance Impact Blueprint?"

Then ask:

"What measurement strategy do you recommend for the Impact Measurement section of the Performance Impact Blueprint?"

AI will provide suggestions. Make sure the answers align with your business goals and performance expectations.



## Step 4: Review and Refine

You're the investigator. Use your judgment.

Read the AI-generated Performance Impact Blueprint closely. If something doesn't make sense or feels off, ask AI to clarify or revise it. You can say things like:

- Can you make that section more specific to [industry or role]?"
- "Please provide examples that relate to [your business goal]."
- "What else would you include to make this more useful for decision-making?"

## Troubleshooting Common Issues

Sometimes AI might leave out a section or give a response that doesn't quite hit the mark. You can guide it just like a good detective leads a witness.

**Here are a few common things that might happen and how to handle them:**

### **AI skips a section**

Ask: "You skipped [section name]. Can you add that section based on the file I uploaded?"

### **AI gives vague or generic answers**

Ask: "Can you make this more specific based on the business goal in the document I shared?"

### **The recommendations don't align with the business context**

Ask: "What would this look like in a [insert industry or department] setting?"

## Case File Review: Smart Follow-Up Questions for AI

Use these follow-ups to get more helpful and specific recommendations:

- What would this look like for a sales training program?"
- "How could this work in a manufacturing environment?"

- “What business metrics would show progress toward the goal in this case?”
- “What learning formats would be most effective for this target audience?”

## Impact Investigator Reminder

Even the sharpest impact investigators double-check their case files. Use your critical thinking. Validate what AI gives you against the facts, clues, and evidence from your investigation. AI can help you build your blueprint but only you can decide what belongs in it.

## Chapter Review

This chapter examined how AI can serve as an assistant to impact investigators. AI can analyze large amounts of workplace performance data, structure Performance Impact Blueprints, and identify trends that humans might overlook. However, AI is not a replacement for investigative expertise. The best results come from combining AI-driven insights with human judgment. By leveraging AI as an assistant, impact investigators can enhance their ability to analyze and present performance impact findings more effectively.

## Impact Investigator Actions

1. Explore AI tools that support workplace performance investigations.
2. Use AI to organize and analyze large sets of performance data.
3. Validate AI-generated insights with human expertise.
4. Integrate AI into performance impact planning without relying on it exclusively.
5. Stay informed about AI advancements that enhance impact measurement efforts.

## What's Next?

AI-assisted blueprints strengthen impact planning, but how do we ensure instructional design aligns with workplace performance? The next chapter introduces the Instructional Design for Performance Framework, a method for designing training with measurable performance outcomes in mind.

# 07

## INSTRUCTIONAL DESIGN FOR PERFORMANCE FRAMEWORK

### Chapter Preview

Instructional design should focus on workplace performance, not just content delivery. In this chapter, we will examine:

1. Explore how instructional design contributes to workplace performance.
2. Discover what the Instructional Design for Performance Framework reveals about aligning learning with business needs.
3. Design learning solutions that reflect performance expectations.
4. Use your completed Workplace Performance Investigation Framework to inform instructional decisions.
5. Connect instructional choices to what success looks like on the job.



## How the Workplace Performance Investigation Framework Informs Performance-Focused Instructional Design

Throughout our investigation, we've examined key elements that help us measure workplace performance. We've explored the role of business goals, human performance requirements, and the Workplace Performance Investigation Framework. These findings have equipped us to shift from viewing training and learning as isolated contributors to recognizing them as part of a broader ecosystem of collective contributions. Now, it's time to apply these clues and facts to instructional design.

Designing training and learning solutions that drive measurable workplace performance requires a structured approach. The Instructional Design for Performance Framework ensures that every design decision is informed by the broader workplace performance ecosystem. Rather than focusing solely on content delivery, this framework emphasizes how learning experiences contribute to business goals and activate employee performance.

Each section of the template aligns with key findings from the Workplace Performance Investigation Framework, ensuring that instructional design is not developed in isolation but as part of a collective effort to support workplace performance. By using this framework, instructional designers create learning solutions that are intentional, performance-driven, and strategically aligned with both business and human performance needs. The following tables illustrate these connections, helping instructional designers create learning experiences that are intentional, strategic, and designed for measurable impact.

**The Instructional Design for Performance Framework ensures that every design decision is informed by the broader workplace performance ecosystem.**



## Instructional Design for Performance Framework

The Instructional Design for Performance Framework provides a structured approach for ensuring that learning solutions are designed with workplace performance in mind. Each instructional design question or consideration is directly connected to a corresponding question from the Workplace Performance Investigation Framework. This alignment ensures that instructional decisions are guided by the broader context of business and human performance, reinforcing that training and learning are part of a larger performance ecosystem. The following tables illustrate these connections, helping instructional designers create learning experiences that are intentional, strategic, and designed for measurable impact.

## Instructional Design Strategies for Business Performance

Design Consideration	Related Workplace Performance Investigation Framework Question(s)
In what ways will the business goal be introduced and reinforced throughout the learning experience?	What is the business goal?
How will the business goal be framed within the context of real-world challenges and opportunities?	What is the opportunity to pursue or problem to solve? What is the directional goal for the metric (move or maintain)?
What approach will be used to highlight the metric that measures the business goal and its directional target?	Is there a metric that monitors the business goal and if so, who owns it? Is there a metric that influences the target metric's movement or stability and if so, who owns it?
How will the contributions of different business functions be integrated to showcase collective impact?	Who is contributing to the business goal, and how?

## Instructional Design Strategies for Human Performance

Design Consideration	Related Workplace Performance Investigation Question(s)
What factors about the target audience will influence the design and delivery of this learning experience?	Whose performance is needed to achieve the business goal?
How will the identified performance requirements be developed or strengthened to achieve the business goal?	What are the skills, capabilities, actions, and behaviors needed to achieve the business goal?
What strategies will ensure that performance is either moved or maintained?	Where is human performance now compared to where it needs to be? Is the goal maintaining or moving human performance?

How will potential barriers to performance be identified and proactively addressed?	What has potential to threaten human performance?
What mechanisms will be in place to support ongoing contributions to performance beyond training?	Are there plans for contributions that influence human performance?

Here’s how the investigation findings inform key instructional design decisions:

- The business goal uncovered in the investigation informs how we introduce and integrate it into instructional design.
- The problem or opportunity to solve provides context for designing learning that aligns with broader workplace performance contributions.
- The metric for monitoring business success ensures that training solutions align with measurable outcomes.
- Contributions from different business functions shape how training integrates with cross-functional efforts.
- Performance requirements for employees guide the development of activities that strengthen skills and behaviors.
- Threats to performance help instructional designers proactively mitigate challenges.

Let’s examine the Instructional Design for Performance Framework for Total Tech & Talent and see how these clues and facts come together.



## Instructional Design for Performance Framework for Total Tech & Talent

As we continue our investigation into performance-based instructional design, we turn to the Total Tech & Talent case study to see how these principles take shape in real-world application. By applying the Workplace Performance Investigation Framework, we ensure that training solutions are not designed in isolation but as part of a broader workplace performance ecosystem. Our case study demonstrates how instructional strategies align with both business and human performance needs, reinforcing the critical role of training in activating measurable performance outcomes.

## Instructional Design Strategies for Business Performance

### **In what ways will the business goal be introduced and reinforced throughout the learning experience?**

The program begins with a leadership message emphasizing the importance of maintaining Full Client Status (FCS) at 70% while integrating the Predictable Talent Plug-In. Real-world case studies illustrate the business need for seamless client engagement.

### **How will the business goal be framed within the context of real-world challenges and opportunities?**

Training modules incorporate role-play simulations where associate consultants practice guiding clients through conversations about the Predictable Talent Plug-In's value. AI-driven scenarios allow participants to experience different customer reactions.

### **What approach will be used to highlight the metric that measures the business goal and its directional target?**

Learners receive insights into how the FCS metric is monitored, who owns the metric, and why maintaining 70% is critical to business stability. Case studies demonstrate how performance impacts business success.

### **How will the contributions of different business functions be integrated to show-case collective impact?**

Training highlights the contributions of multiple departments, including Sales Innovation, Product Innovation, and Marketing, reinforcing that maintaining FCS is a collective effort. Real-world cross-functional collaboration exercises are included.

## Instructional Design Strategies for Human Performance

### **What factors about the target audience will influence the design and delivery of this learning experience?**

The training is designed for a global workforce with multilingual support, cultural adaptability, and localized case studies. Interactive e-learning modules accommodate different learning preferences.

### **How will the identified performance requirements be developed or strengthened to achieve the business goal?**

Associate consultants must effectively communicate the Predictable Talent Plug-In's value, navigate objections, and guide clients through decision-making. AI-powered practice labs and interactive coaching reinforce these skills.

### **What strategies will ensure that performance is either moved or maintained?**

Ongoing reinforcement strategies, such as microlearning refreshers, manager coaching guides, and peer learning groups, support performance maintenance beyond initial training.

### **How will potential barriers to performance be identified and proactively addressed?**

The training addresses resistance to AI adoption by demonstrating how the Predictable Talent Plug-In enhances rather than replaces the consultant's role. Scenario-based learning provides practice handling skeptical clients.

### **What mechanisms will be in place to support ongoing contributions to performance beyond training?**

Employees engage in focus groups on how their performance contributes to overall business success. Post-training support includes access to knowledge portals, job aids, and collaborative forums for knowledge sharing.



The Instructional Design for Performance Framework ensures that every training decision is informed by the broader workplace performance ecosystem. Instead of focusing solely on content delivery, this framework emphasizes how learning experiences contribute to business goals and activate employee performance. A structured approach like this helps instructional designers create training and learning solutions that are intentional, performance-driven, and strategically aligned with both business and human performance needs.

By aligning instructional design with key findings from the Workplace Performance Investigation Framework, training is not developed in isolation but as part of a collective effort to support workplace performance. Each section of the template reinforces measurable business and human performance outcomes, ensuring that learning experiences are directly tied to real-world impact. Mapping instructional strategies to performance needs ensures that training programs enhance capabilities that matter most to business success.

This framework enables instructional designers to take a systematic, evidence-based approach to training design. When learning solutions are built with precision and alignment, they not only move or maintain employee performance but also strengthen the organization's broader strategic objectives. By reinforcing collective contributions, organizations ensure that training solutions are purposeful, impactful, and lead to measurable workplace success.

**When learning solutions are built with precision and alignment, they not only move or maintain employee performance but also strengthen the organization's broader strategic objectives.**



## Performance-Focused Program Descriptions

A performance-focused program description does more than introduce a training program. It connects the learning experience to the business goal and expected performance outcomes, ensuring that instructional design is intentional, relevant, and performance-driven.

Traditional training descriptions often focus on what participants will learn, know, and understand after completing a program. However, a performance-based program description shifts the focus to what participants will be able to do as a result of the learning experience. This ensures that the training is not just an information transfer but a structured approach to activating behaviors, skills, capabilities, and actions that contribute to workplace success.

By framing program descriptions around measurable performance outcomes, instructional designers create stronger alignment between training and business needs. These descriptions ensure that the learning experience is directly linked to the performance requirements necessary to achieve business goals, reinforcing that training is a strategic contributor to organizational goals.

## Why Use Performance-Focused Program Descriptions?

- They clearly define the business goal and how the program supports it.
- They emphasize performance as the intended outcome, rather than knowledge acquisition.
- They ensure the program resonates with the target audience by answering, “What’s in it for me?”
- They create a compelling case for why the training exists and how it contributes to workplace performance.

### Example: Before & After

Traditional Training Program Description	Performance-Focused Program Description
This course will introduce employees to the Predictable Talent Plug-In. Participants will learn about its features and how it supports client conversion.	This program equips associate consultants with the ability to confidently communicate the Predictable Talent Plug-In’s value, address client objections, and maintain Full Client Status (FCS) at 70%.
Attendees will explore the benefits of AI-powered tools and gain insight into the company’s latest technology solutions.	By the end of this program, participants will be able to integrate the Predictable Talent Plug-In into client conversations, aligning its benefits with client needs to drive successful outcomes.

A well-structured performance-based program description is more than an introduction to training. It serves as a strategic tool that aligns learning with business goals and workplace performance. By shifting the focus from what participants will learn to what they will be able to do, these descriptions ensure training is meaningful, measurable, and relevant. When instructional designers craft descriptions that clearly define business objectives, performance expectations, and the ‘What’s in it for me?’ aspect, they create training experiences that drive both individual and organizational success.

## Performance-Focused Outcomes

The L&D industry must shift toward a performance-first focus, ensuring that training programs and learning solutions are designed with clear, measurable performance-based outcomes. Instead of framing learning experiences

around what participants will know or understand, instructional design must emphasize what employees will be able to do after training. This mindset shift ensures that learning directly supports workplace performance.

Performance-focused outcomes go beyond traditional learning objectives by aligning with real-world application. They define the specific skills, behaviors, capabilities, and actions employees need to demonstrate on the job, making success observable and measurable. When organizations adopt a performance-first approach, they reinforce the expectation that training leads to tangible business impact, not just knowledge retention.

By embedding performance-focused outcomes into training design, L&D professionals ensure that learning solutions are not only engaging and informative but also purposeful and results-driven. This approach helps create a direct line of sight between training and business goals, ensuring that programs and solutions contribute meaningfully to organizational performance and workforce capability development.

## Why Performance-Focused Outcomes Matter

- They ensure training drives measurable workplace performance.
- They create clear expectations for both learners and stakeholders.
- They establish a direct connection between training and business goals.
- They guide instructional design decisions, ensuring alignment with workplace realities.

## Example: Before & After

Traditional Learning Objective	Performance-Focused Outcomes
You will understand the importance of effective communication.	Remove communication barriers when working with people who have different communication styles.
You will know how to handle conflict.	“Manage and resolve conflict by interpreting behavior instead of reacting emotionally.
You will learn the importance of emotional intelligence.	Adapt your approach when working with colleagues who have different work styles.

Performance-focused outcomes are essential for ensuring that training translates into real-world application and business impact. By clearly defining the skills, behaviors, and actions that employees must demonstrate on the job, instructional designers reinforce a performance-first approach to learning. This method not only strengthens the connection between training and business success but also supports a culture where learning is a catalyst for measurable workplace performance. When organizations consistently apply this approach, they embed a results-driven mindset that elevates the role of training in achieving business goals.



## Case Study: Performance-Focused Program Description with Performance-Focused Outcomes for Total Tech & Talent

A well-crafted performance-focused program description and its corresponding performance-based outcomes ensure that learning is strategically aligned with business and human performance goals. The example provided illustrates how training is not just about acquiring knowledge but about activating measurable performance in the workplace. This alignment ensures that training programs contribute directly to business success by improving employee capabilities in ways that matter most to organizational goals.

By using this structured approach, instructional designers create programs that are intentional, impactful, and designed for measurable performance improvement. Performance is the expected outcome for training and learning, and this example illustrates how well-defined program descriptions and outcomes support both business and human performance in meaningful ways.

### Program Title

Driving Client Engagement with the Predictable Talent Plug-In

### Program Description

How can you ensure that the Predictable Talent Plug-In enhances client engagement without disrupting business goals? What role do you play in helping potential clients see the value of AI-driven solutions? How can you build confidence in guiding clients through the decision-making process?

Associate consultants are essential to engaging potential clients, communicating the value of new technology, and driving conversions. This program equips participants with the skills and confidence to seamlessly integrate the Predictable Talent Plug-In into client conversations, ensuring they maintain Full Client Status (FCS) at 70% while leveraging AI-powered solutions to support client needs.

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## Performance Outcomes

- Effectively communicate the value of the Predictable Talent Plug-In to potential clients.
- Navigate client objections by addressing concerns related to product features, pricing, and implementation.
- Guide potential clients through the decision-making process by aligning the Predictable Talent Plug-In with their business needs.
- Maintain Full Client Status (FCS) at 70% by integrating best practices from video simulations and real-world case studies.
- Leverage AI-driven insights from the Predictable Talent Plug-In to provide data-informed recommendations that enhance client decision-making.

Here's why the example is valuable and effective:

- **Directly connects learning to business goals** - The program description clarifies how training supports Full Client Status (FCS) at 70%, reinforcing business priorities.
- **Emphasizes measurable outcomes** - The outcomes describe specific actions employees will take on the job, ensuring that success is observable and trackable.
- **Frames learning in a real-world context** - The description and outcomes are built around workplace challenges, making training relevant and applicable.
- **Strengthens human performance contributions** - The focus on client engagement, objection handling, and AI integration ensures employees develop the capabilities needed for success.
- **Addresses the "What's in it for me?" factor** - The description positions learning as a tool for employee confidence, skill-building, and career growth, increasing motivation and engagement.

This example reinforces how well-structured program descriptions and performance-based outcomes ensure training leads to measurable workplace impact. By aligning learning experiences with business and human performance goals, instructional designers create programs that drive meaningful contributions to both individual success and organizational objectives.

## Chapter Review

This chapter shifted the focus from content-based instructional design to performance-based instructional design. The Instructional Design for Performance Framework ensures that training solutions are aligned with measurable business outcomes and human performance requirements. By designing learning experiences that activate performance, L&D professionals reinforce their role as strategic partners in business success.

## Impact Investigator Actions

1. Apply the Instructional Design for Performance Framework to learning initiatives.
2. Write performance-based program descriptions that connect learning to business goals.
3. Define performance-based outcomes that reflect what success looks like on the job.
4. Align instructional design with clearly defined performance expectations.
5. Use results from your completed Workplace Performance Investigation Framework to guide instructional decisions.

## What's Next?

Just like AI can assist you with creating a Performance Impact Blueprint, it can also support the design of learning solutions aligned with business and human performance goals. The next chapter explores how to use AI as your assistant for instructional design, helping you turn performance requirements into targeted, purposeful, and practical learning experiences.

# 08

## AI-ASSISTED INSTRUCTIONAL DESIGN FOR PERFORMANCE

### Chapter Preview

Just like AI can assist you with creating a Performance Impact Blueprint, it can also support your instructional design process. In this chapter, we explore how to use AI as your assistant for designing learning solutions aligned with business and human performance goals. Together, you and AI will generate a performance-focused program description, clearly defined outcomes, and structured design strategies for instruction. In this chapter, we will explore:

1. How AI supports instructional design by analyzing performance data.
2. The role of AI in automating content creation and customization.
3. Ways AI helps track and reinforce learning for measurable impact.
4. How to balance AI-driven insights with human-centered instructional strategies.
5. Practical methods for integrating AI into instructional design processes.

### AI as Your Investigative Assistant for Instructional Design

AI serves as a design assistant, just like Dr. Watson assisted Sherlock Holmes. It helps organize your thinking, convert performance data into design strategies, and structure learning experiences that align with your completed Workplace Performance Investigation Framework. AI does not replace your expertise. It supports your judgment with structure and speed.

Instructional design becomes more focused and relevant when it starts with performance. AI can assist you with building learning experiences that respond directly to what people need to do, not just what they need to know. With your guidance, AI transforms investigation findings into instructional design that supports business and human performance.

## Disclaimer: AI's Limitations

AI is a powerful tool, but it is not perfect. While it can assist in structuring instructional design strategies, human expertise remains essential.

- AI does not understand the workplace like you do. It identifies patterns, but lacks situational context.
- Generated content may require refinement. AI outputs depend on the quality and clarity of your input.
- AI cannot replace your role as a performance-focused instructional designer.
- AI's responses may vary, even with the same prompt.
- Different platforms produce different results. Always review and refine for alignment with performance goals.

Approach AI with an instructional mindset. Guide, prompt, and refine its outputs the same way you would shape any design element. Instructions in this chapter are based on using ChatGPT (version 4 as of this writing), which is my personal preference and not an endorsement of the platform.

## Bringing AI Into Your Instructional Design Process

Let's explore how AI helps generate a complete instructional design plan based on your completed Workplace Performance Investigation Framework.

### Key Takeaways:

- AI can generate instructional strategies that align with both business goals and human performance outcomes.
- AI can translate insights from your completed Workplace Performance Investigation Framework into performance-based program descriptions and outcomes.
- AI can recommend content ideas, practice activities, and reinforcement strategies that support targeted behaviors and capabilities.
- AI can accelerate the design process, but it still requires your expertise to ensure accuracy, alignment, and impact.



## Generating an AI-Assisted Instructional Design for Performance Framework

If you're new to AI, this section will guide you through a simple, step-by-step process to help you use AI for creating your Instructional Design for Performance Framework. You'll need two things to get started:

1. A completed Workplace Performance Investigation Framework.
2. A description of one training program, learning solution, or performance support tool that you're designing.

You'll be asking AI to create four things:

1. A performance-focused program description.
2. A set of at least three performance-focused outcomes.
3. Instructional design strategies for business performance.
4. Instructional design strategies for human performance.

Here's how to do it.

### Step 1: Start a New Chat with AI

**Open ChatGPT or your preferred AI tool. Start a new conversation.**

Before you do anything else, attach your completed Workplace Performance Investigation Framework. In ChatGPT, click the "+" icon next to the message box and upload your file. This gives AI the information it needs to generate an instructional design strategy that aligns with your performance goals.

### Step 2: Describe Your Training Solution

Next, tell AI what you're designing. It can be a single training program, learning solution, business simulation, or performance support tool. Only describe one at a time.

Here's a simple way to do that:

"I'm designing a learning solution to help global help desk reps maintain high-quality customer service during the rollout of a new AI-powered feature."

## Step 3: Ask AI to Create the Instructional Design for Performance Framework

Once your file is uploaded and your training solution is described, copy and paste this message into the chat:

"Act as an Instructional Designer based on the completed Workplace Performance Investigation Framework I uploaded, and the training solution I described, create the following

1. **A performance-based program description that connects the learning experience to business and human performance goals.**
2. **A set of at least three performance-based outcomes that describe what successful performance looks like.**
3. **Instructional design strategies for business performance, using the following questions:**
  - In what ways will the business goal be introduced and reinforced throughout the learning experience?
  - How will the business goal be framed within the context of real-world challenges and opportunities?
  - What approach will be used to highlight the metric that measures the business goal and its directional target?
  - How will the contributions of different business functions be integrated to showcase collective impact?
4. **Instructional design strategies for human performance, using the following questions:**
  - What factors about the target audience will influence the design and delivery of this learning experience?
  - How will the identified performance requirements be developed or strengthened to achieve the business goal?
  - What strategies will ensure that performance is either moved or maintained?
  - How will potential barriers to performance be identified and proactively addressed?
  - What mechanisms will be in place to support ongoing contributions to performance beyond training?

Please present the responses in clear, structured text. There's no need for table formatting."

## Step 4: Review and Refine

AI will generate results quickly but your role as the instructional designer is to refine and validate.

If something is too vague, not relevant, or overly generic, ask AI to improve it. Try prompts like:

- “Can you make this more specific to help desk professionals?”
- “Please rewrite this outcome so it describes observable performance.”
- “What would this strategy look like for a global workforce with multiple time zones?”

## Troubleshooting Common Issues

You might run into a few bumps along the way. Here are some helpful ways to respond:

### **AI skips a section**

Ask: “You skipped [section name]. Can you add that based on what I uploaded?”

### **Outcomes are vague or knowledge-based**

Ask: “Can you rewrite these so they focus on performance, not just knowledge?”

### **Instructional strategies feel too generic**

Ask: “What would this look like in a high-volume, high-pressure customer service environment?”

### **No connection to business goal**

Ask: “Can you show how this connects back to the business goal?”

## Case File Review: Smart Follow-Up Questions for AI

Use these questions to get more specific or relevant results:

- “What would this learning experience look like for salespeople instead of service reps?”
- “How can I adapt this for new hires versus experienced employees?”
- “What strategies would you recommend for reinforcing learning after the training ends?”
- “What performance risks should I consider during instructional design?”

## Impact Investigator Reminder

AI can help generate ideas and organize your design but it doesn't know your audience like you do. Think of AI as a tool in your investigative kit. You still have to examine the clues, analyze the evidence, and make the final call. Instructional design isn't just about information. It's about changing what people do. Let AI assist you, but never stop using your own expertise.

## Chapter Review

This chapter introduced the use of AI as an assistant for creating the Instructional Design for Performance Framework. AI can help generate performance-based descriptions, outcomes, and instructional strategies faster and with more structure when guided by your expertise. By combining your completed Workplace Performance Investigation Framework with a clearly defined training solution, you can design learning experiences that align with business goals and human performance needs.

## Impact Investigator Actions

1. Use AI to structure instructional design strategies based on performance needs.
2. Create performance-based program descriptions that link learning to business goals.
3. Define performance-based outcomes that reflect real workplace success.
4. Align instructional strategies with the results from your completed Workplace Performance Investigation Framework.
5. Guide and refine AI-generated content to ensure relevance, accuracy, and credibility.

## What's Next?

Now that you've seen how AI can assist with designing instruction that supports workplace performance, it's time to investigate something deeper. In the next chapter, we explore an important and controversial question every impact investigator must ask: Should we measure training and learning in isolation or as part of a collective contribution?

# 09

## CONTRIBUTION OR ISOLATION: WHAT SHOULD WE INVESTIGATE

### Chapter Preview

The desire to isolate training's impact is understandable. Organizations want proof for training and learning's unique contribution. However, workplace performance is shaped by multiple contributors. In this chapter, we will investigate:

1. Why isolating training's impact is appealing but difficult.
2. The methods used to attempt impact isolation, including control and test groups.
3. Why collective contribution is often a more practical approach.
4. The risks of focusing too narrowly on isolating training's effect.
5. How impact investigators balance credibility and complexity in measurement.

### The Appeal and Challenge of Investigating Unique Contribution

The idea of isolating impact, or what I call investigating training's unique contribution, is understandably appealing. Business leaders and stakeholders often look for clear, direct proof that training leads to results. As learning professionals, we share that desire. We want to demonstrate that our work has meaningful, measurable influence. The possibility of drawing a straight line between training and performance outcomes offers a sense of clarity and validation.

At the same time, I believe the power of education through training, learning, and talent development is widely understood, even if not always explicitly acknowledged. When people seek proof, it's not always because they doubt the value of education itself. Often, they're looking for reassurance that investments in training are making a difference in a complex environment. The real challenge is not proving that training and learning matter.

The challenge is uncovering how that value shows up amid all the moving parts in the workplace performance ecosystem.

## Isolation

The image below represents the concept of isolating training and learning from the workplace performance ecosystem. It removes training from business performance contributions and human performance contributions, suggesting an attempt to attribute outcomes to training and learning as an experience and L&D as a function, independent from other contributions. The idea is appealing but it oversimplifies the complexity of performance impact by ignoring other contributing factors.



## Contribution

The image below illustrates the collective nature of workplace performance, where training and learning are part of a broader ecosystem. It shows multiple contributors working together toward a common business goal, highlighting the reality that performance results come from the combined influence of people, processes, tools, and support systems, including, but not limited to training and learning as an experience and L&D as a function.



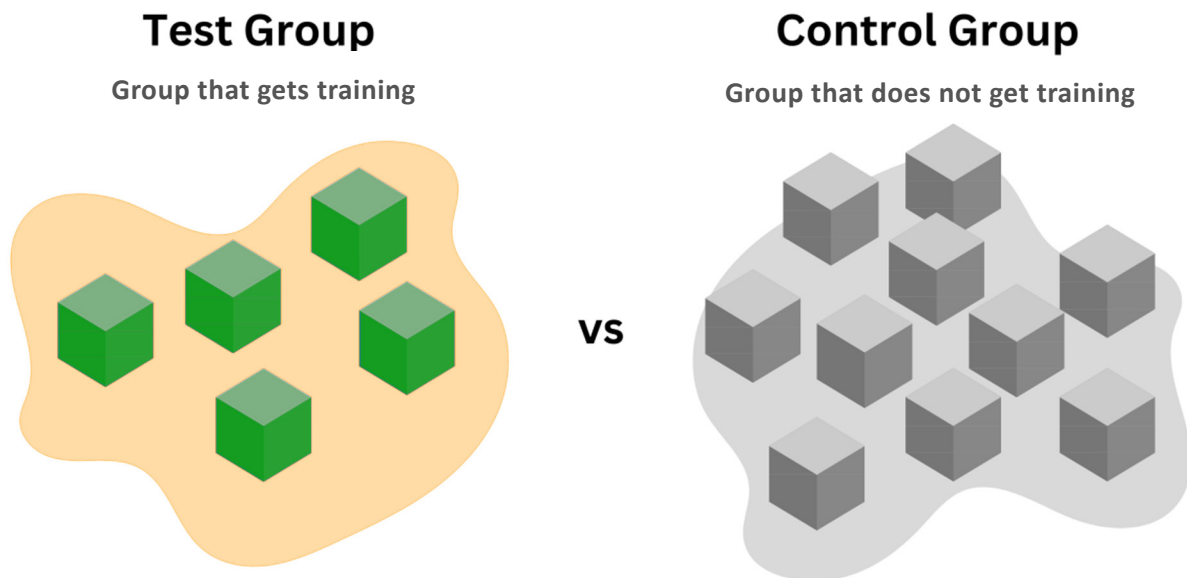
This is why I focus on investigating collective contribution versus isolated impact. Training and learning do not exist in a vacuum. They operate within a broader performance ecosystem where multiple factors influence outcomes. For me, a more meaningful approach is to uncover how training interacts with and amplifies other performance activators. Instead of trying to attribute performance shifts solely to training, I am curious about its role within the bigger picture. Throughout this chapter, we will explore the tension between contribution and isolation, and you will decide for yourself which approach is best for your organization.

**For me, a more meaningful approach is to uncover how training interacts with and amplifies other performance activators.**



## A Balanced Perspective on Contribution and Isolation

My mentors and whom I affectionately call my measurement “mom” and “dad,” Patti and Jack Phillips, founders of the ROI Institute, have developed credible, reliable methodologies for measuring training’s isolated impact. Their Return on Investment (ROI) Model provides structured ways to attribute performance outcomes to training efforts. These methods are widely used and respected in the global training, learning, and talent development industry. Their work is undeniably valuable and has shaped my thinking about measuring impact for training and learning.



Several methods exist for isolating impact, but in my view, control and test groups (also called A/B testing) offer the most reliable approach. Many organizations seek to isolate training's effect to justify their investment, which is understandable. However, using control and test groups is not always practical in fast-paced business environments. Even when they are implemented, factors such as leadership support, process changes, or market conditions can still influence performance outcomes. This reality underscores the challenge of pinpointing training's unique contribution within a broader performance ecosystem.

Surveys are another commonly used tool for investigating unique contribution, but they come with challenges. While they provide insight into employees' perceptions of training effectiveness, they rely on self-reported data, which is inherently subjective. People's perceptions do not always align with measurable business outcomes. Additionally, when organizations focus too much on proving training's isolated impact, it can create competition rather than collaboration among different business functions, leading to siloed efforts instead of a shared commitment to performance goals.

## Five Methods for Investigating Unique Contribution

Let's explore five methods for isolating impact and examine the pros and cons of each.



## Control Groups and Comparisons

### Methods

A control group that does not receive training is compared to a test group that does. This method, similar to a scientific experiment, helps highlight differences attributable to training.

### Pros

Provides a clear comparison to show training's impact

Offers measurable and objective data

### Cons

Requires time and resources that may not be feasible in a fast-moving business environment

Does not account for other business and human performance factors that may also influence results

## Performance Metrics Analysis

### Methods

Human performance data is integrated with key performance indicators (KPIs) to examine trends and correlations between training and business outcomes.

### Pros

Links training to business outcomes using actual performance data

Provides measurable insights into training effectiveness

### Cons

Correlation does not imply causation, meaning other factors may also contribute to the observed results

Requires comprehensive and accurate data, which may not always be available

## Performance Benchmarking

### Methods

Benchmarks are established before training, and post-training performance is compared against them.

### Pros

Creates a clear baseline for measuring performance changes

Helps demonstrate trends and patterns

### Cons

External conditions or shifts in business priorities can impact the relevance of benchmarks

Does not isolate training's impact from other workplace influences

## Behavioral Observation

### Methods

Observing employee behavior and work habits post-training to assess how knowledge and skills are applied on the job.

### Pros

Provides real-time, observable data on how training affects workplace behaviors. performance changes

Offers tangible, immediate evidence of training impact.

### Cons

Subjective and requires consistent, unbiased observation methods.

Time-consuming and may not be scalable for large organizations

## Longitudinal Studies

### Methods

Tracking performance over an extended period post-training to assess sustained impact.

### Pros

Highlights long-term benefits of training, demonstrating its ongoing contribution.

Allows measurement of trends and patterns over time.

### Cons

Requires sustained commitment and resources for data collection.

Organizational changes and external factors may influence long-term results.

Each of these methods offers valuable insights into training's unique contribution, and each comes with its own challenges. Isolating impact can provide clarity and help justify investments in L&D, but it often requires significant time, data, and controlled conditions that may not be realistic in fast-paced business environments. On the other hand, investigating collective contribution acknowledges training's role within a broader ecosystem of performance influencers, but it may not always deliver the definitive proof that some stakeholders seek. The choice depends on your organization's needs, resources, and approach to performance measurement.

## Investigating Contribution as Part of a Performance Ecosystem

Instead of viewing training as a standalone factor, I examine it within the broader workplace performance ecosystem. Business performance contributors and human performance activators all play a role in achieving business goals. Training is one piece of that puzzle, but it is not the only one. Investigating collective contribution means examining all the elements in the workplace performance system and how they contribute to business goals.

My time as Measurement Principal at the world's largest social media company reinforced this perspective. Training did not function in isolation. It was part of a larger strategy that included

multiple contributions in the workplace performance ecosystem. The most impactful measurement efforts focused on how training contributed to business goals rather than attempting to isolate its effect. This approach provided a more comprehensive and actionable understanding of training's contribution in driving performance. By investigating training's contribution, we acknowledge the complexity of workplace performance while still demonstrating value. We shift from trying to isolate a single cause-and-effect relationship to understanding how training interacts with the broader system. This perspective reinforces the importance of measurement by ensuring it aligns with how business performance actually works.

**By investigating training's contribution, we acknowledge the complexity of workplace performance while still demonstrating value.**



## Your Decision: Contribution or Isolation?

Ultimately, the decision about whether to focus on contribution or isolation is yours. Some organizations may require isolated impact data to justify training investments, while others may find more value in a contribution-based approach. The key is to align your measurement strategy with business needs and workplace realities.

As an impact investigator, your role is to uncover facts, clues, and evidence that reveal training's role in the performance ecosystem. Whether you choose to investigate collective contribution or isolated impact, the goal remains the same: to provide a credible, compelling case for training's effect on human and business performance. The real mystery to solve is not whether training made a difference, but how it contributed to the larger picture of workplace success.

The debate over isolating training's impact versus investigating collective contribution is complex. While isolation offers a clear link between training and performance, it's often impractical in dynamic business environments.

Contribution reflects workplace interdependencies but may not satisfy those seeking definitive proof. My goal is presenting a balanced view, highlighting credible isolation methods while emphasizing training's role within a broader performance ecosystem. Impact investigators determine the best measurement approach based on stakeholder expectations, practicality, and measurement goals.

## When Isolating Impact Might Be Required

There are times when investigating training's unique contribution may be necessary. Some programs have a high level of investment, visibility, or strategic importance, making it critical to determine the direct impact. While I emphasize contribution within the workplace performance ecosystem, there are specific conditions where isolating impact can provide valuable insights for stakeholders.

Here are examples of programs where isolating impact might be worth the effort:

- Programs that require significant investments in time, money, and development.
- Programs that have high visibility.
- Programs with executive sponsorship.
- Programs with a large target audience.
- Programs that take employees offline for a significant amount of time.

In some cases, executive leaders, the C-suite, or stakeholders insist on isolating impact to justify investment and decision-making. If so, we can use one of the five isolation techniques identified in this chapter. When possible, test and control groups provide the most credible and reliable signal for impact. However, even with this approach, other performance influences must be considered. Training and learning cannot be viewed as the absolute difference that made a difference in achieving the business goal.

This raises critical questions:

- After isolating impact, how do we account for workplace performance influences such as manager coaching, incentives, natural ability, or the tools and technology that help people do their jobs?
- After isolating impact, how do we account for contributions from other teams that influence the business goal?

Personally, I remain unconvinced that we can isolate training in ways that definitively prove that training alone is the most, or least influential difference. We can make a strong argument that training and learning influenced performance, but we cannot claim that training by itself is what drove the outcome. Workplace performance is shaped by multiple contributors, and training is one of many factors that influence results. To present impact with integrity, we must acknowledge that while training may play a significant role, it does not operate in isolation.

For impact investigators, the challenge is presenting findings with transparency. If training and learning contributed, we should say so. But we must acknowledge the broader set of conditions that shape workplace performance. This ensures that our findings are honest, accurate, responsible, and aligned with the realities of business impact.

## Chapter Review

This chapter examined the tension between isolating training's impact and investigating collective contributions. While methods such as control and test groups can provide clearer attribution, they are not always practical. Surveys and self-reported data are often unreliable, making it difficult to isolate training's effect definitively. Instead, impact investigators must focus on understanding training's role within the broader workplace performance ecosystem. Measuring collective contribution provides a more comprehensive and realistic view of impact, ensuring that all performance influencers are acknowledged. The chapter emphasized that the most credible measurement efforts consider multiple contributing factors rather than isolating training alone.

## Impact Investigator Actions

1. Examine how training interacts with other workplace performance contributors.
2. Identify when isolating impact is necessary and when a collective approach is better.
3. Use control and test groups when possible but remain mindful of influencing factors.
4. Avoid over-reliance on subjective survey data to claim training's effect.
5. Present training's contribution as part of a broader performance improvement strategy.

## What's Next?

The most credible and compelling clues for business performance impact come from business performance metrics. In the next chapter, we'll examine how performance consulting works hand-in-hand with impact investigation. This essential skill empowers impact investigators to guide business partners and stakeholders toward the right solutions by uncovering facts, exploring performance challenges, and avoiding assumptions.

# 10

## PERFORMANCE CONSULTING FOR IMPACT INVESTIGATORS

### Chapter Preview

Performance consulting is the foundation for investigating training and learning's impact. Everything explored up to this point has built the mindset, tools, and methods that prepare impact investigators to operate as workplace performance consultants. In this chapter, we will:

1. Discover how previous chapters have prepared you to consult with confidence.
2. Investigate how performance consulting shifts L&D from order takers to impact makers.
3. Explore the role of the Workplace Performance Investigation Framework in consulting for performance.
4. Navigate common challenges when guiding business partners to the right solution.
5. Present findings and recommendations with professionalism even when training is not the solution.

### From Clues to Consulting

Everything you've discovered has prepared you for this moment. The Workplace Performance Investigation Framework, Performance Impact Blueprint, AI-assisted strategies, and Instructional Design for Performance Framework have all contributed to building your impact investigation skills. As an impact investigator, you've been steadily developing the capabilities of a performance consultant. You've examined business goals, uncovered human performance needs, and navigated the complexities of the workplace performance ecosystem. Those are not just measurement activities. They are performance consulting skills in action.

Being a performance consultant is not a separate function. It is a natural extension of your role as an impact investigator. The impact investigation work you've done with the Total Tech & Talent case study has prepared you for the next step. You may not know it, but you've already been operating like a performance consultant.

Everything you've learned has led you here. Now it's time to operate as a strategic advisor, using investigative skills and insights to guide decisions that impact business and human performance. Performance consulting is how we ensure that training and learning are purposeful, aligned, and impactful before they are designed or released into the workplace performance ecosystem.

## The Shift from Order Takers to Impact Makers with Performance Consulting

You're probably thinking, What does performance consulting have to do with being an impact investigator and measuring collective contributions to workplace performance? It has everything to do with it. Impact investigators don't just investigate results after training has been delivered. We ensure that training is the right solution before it is designed and implemented. Performance consulting helps us move beyond responding to training requests. It allows us to investigate the factors influencing performance with curiosity and discovery. Without this investigative approach, we risk measuring the wrong thing, addressing the wrong problem, or implementing training that has little to no impact.



**Give me one half-day workshop, two virtual programs, and one eLearning to go please.**



Training is often treated like a fast-food order, where requestors expect quick fulfillment without deeper analysis. "Give me one classroom in-person program, a virtual training, and one eLearning to go, please." This transactional approach reduces L&D to fulfillment centers rather than a strategic business partner. The Total Tech & Talent case study illustrates why performance consulting is essential. Instead of simply taking the order, the L&D team conducted a workplace performance investigation. They found that associate consultants were already exceeding performance expectations, meaning there was no actual performance gap. However, the investigation uncovered risks to performance, including uncertainty about the Predictive Talent Plug-In's impact on their role and resistance to change.

performance expectations, meaning there was no actual performance gap. However, the investigation uncovered risks to performance, including uncertainty about the Predictive Talent Plug-In's impact on their role and resistance to change.

This shift from order takers to impact makers positions L&D as strategic partners in workplace performance. Training alone does not drive results. The Total Tech & Talent case study reinforces that performance consulting is about investigating before acting. By clarifying business and human performance factors, the L&D team ensures that any solutions, including training, are based on evidence rather than speculation. This investigative approach allows L&D to make informed decisions rather than simply fulfilling requests. In the next section, we explore how the Workplace Performance Investigation Framework empowers impact investigators to lead with performance consulting.

## The Workplace Performance Investigation Framework: Your Performance Consulting Methodology

The Workplace Performance Investigation Framework is more than just an idea. It is a methodology that strengthens our performance consulting capabilities and positions us to measure impact. It enables us to:

- Investigate performance needs before recommending training.
- Ensure alignment between learning and business goals.
- Identify human performance requirements that drive success.
- Consider all contributions within the workplace performance ecosystem.
- Make informed recommendations based on facts and evidence.
- Measure and investigate training and learning's contribution to workplace performance in a structured, scalable, operationalized, repeatable, fact-based way.

This framework is the investigative approach outlined in Chapter 3. Instead of assuming training is the solution, we gather facts, clues, and evidence to determine the best solution in response to training requests. As performance consultants and impact investigators, our goal is analyzing the entire workplace performance ecosystem before designing a training program or learning solution and ensure we can measure contribution.

## Impact Investigators: Performance Consultant & Strategic Advisor

An impact investigator does more than collect facts and evidence. They operate as performance consultants and strategic advisors, using investigative methods to uncover what influences workplace performance.



The Workplace Performance Investigation Framework provides the facts, clues, and evidence needed to assess workplace performance. But it is abductive reasoning that turns those findings into actionable recommendations. Instead of reacting to requests, impact investigators analyze patterns, form logical hypotheses, and determine the most plausible solutions based on business and human performance conditions. This approach positions L&D as a valued advisor rather than a service provider.

- Being strategic vs. tactical – Shifting from reactive order taking to proactive, strategic consulting.
- Alignment with business goals – Ensuring that learning solutions drive measurable business outcomes.
- Focusing on human performance – Identifying the behaviors and skills that truly impact business performance.
- Empowering fact-based decisions – Using the framework to gather evidence and make informed recommendations.
- Positioning L&D to measure contribution – With this framework, we can investigate, analyze, and demonstrate how training and learning contribute to workplace performance.

Abductive reasoning helps impact investigators transform workplace investigation results into actionable insights. It allows us to evaluate multiple possibilities, rule out ineffective solutions, and recommend options that align with business needs. Impact investigators rely on logic and informed judgment to make sense of incomplete or complex results. Our recommendations are grounded in evidence, not guesswork or speculation.

By leveraging this approach, impact investigators become trusted advisors who influence decisions at the highest levels. The Workplace Performance Investiga-

tion Framework keeps the focus on performance, and abductive reasoning ensures solutions are practical, relevant, and tied to real business priorities. This combination strengthens L&D's credibility and transforms the function from order takers to strategic partners for workplace performance.



## Navigating Challenges in the Shift to Performance Consulting

Using the Workplace Performance Investigation Framework to conduct a performance needs analysis and discover ways in which to measure impact is not without its challenges. Many training requestors are accustomed to

a transactional approach, where training is seen as a quick-fix answer rather than a strategic solution. Likewise, shifting to a performance-first mindset can also be a challenge for L&D practitioners, as it requires breaking away from traditional training delivery models and embracing a more investigative, consultative, discovery-based approach.

Shifting to a performance-based, consultative mindset and method means asking deeper questions about the workplace performance ecosystem. By doing so, we ensure that training programs and learning solutions are not only effective but also aligned with the broader workplace performance equation: workplace performance equals business performance plus human performance. This shift establishes us as true performance consultants, positioning training and learning as purposeful contributors to measurable workplace success. It ensures our efforts drive meaningful outcomes rather than simply responding to requests.

The following tables outline some of the challenges for the shift to performance consulting and corresponding strategies to overcome these challenges:

Challenges for Training Requestors	Overcoming Challenges for Training Requestors
Accustomed to quick, transactional orders, expecting rapid delivery without deep inquiry.	<b>Communicate Benefits:</b> Clearly explain how probing questions lead to tailored solutions that better meet their business needs.
Find detailed questions (e.g., “What business goal are you trying to achieve?”) intrusive or irrelevant.	<b>Provide Context:</b> Help them understand that detailed inquiries ensure training is aligned with strategic objectives, ultimately saving time and resources.
Become agitated when asked for extensive background information or metrics, viewing it as an unnecessary delay.	<b>Foster Empathy:</b> Engage in open dialogue to acknowledge their concerns while demonstrating how thorough analysis prevents future issues.
Resist the performance-based approach because it challenges the traditional “just give me training” mindset.	<b>Share Successes:</b> Use real-world examples to illustrate how an investigative approach has led to better outcomes.
See the time spent answering probing questions as a waste when under pressure to implement solutions quickly.	<b>Reframe the Process:</b> Emphasize that investing time upfront in understanding challenges results in more effective, long-term solutions.

Challenges for L&D Practitioners	Overcoming Challenges for L&D Practitioners
Shifting from a training delivery mindset to a performance consulting mindset.	<b>Adopt a Performance-First Perspective:</b> Build skills in workplace performance investigation, consultative questioning, and aligning learning with business outcomes.
Being patient with training requestors unfamiliar with the Workplace Performance Investigation Framework can be difficult.	<b>Lead with Patience and Clarity:</b> Help requestors understand the process by explaining it clearly and guiding them with empathy.
Facing resistance from stakeholders accustomed to traditional training requests	<b>Communicate the Value of Investigation:</b> Explain how performance consulting enhances business impact and set clear expectations for why deeper analysis leads to better solutions.
Managing pushback from training requestors who want quick solutions instead of a deeper investigation.	<b>Set Clear Expectations:</b> Emphasize that a thorough performance investigation ensures training effectiveness and long-term success, even when time is limited.
Gathering answers from multiple stakeholders can feel overwhelming and confusing, like navigating a maze.	<b>Stay Organized and Strategic:</b> Identify key stakeholders early, map out who owns which information, and use a checklist to track progress.

Navigating these challenges is like solving a complex case. Both training requestors and L&D practitioners face obstacles, from pressure for rapid delivery to shifting from a transactional to a performance consulting mindset. Overcoming these challenges requires empathy, clear communication, and a commitment to evidence-based inquiry. By applying our detective mindset and the Workplace Performance Investigation Framework, we turn resistance into opportunity. This approach supports the need for the workplace performance ecosystem while fostering collaboration, ensuring every piece of evidence drives measurable, sustainable performance, whether through improvement, stability, or maintaining success in workplace performance.

**By applying our detective mindset and the Workplace Performance Investigation Framework, we turn resistance into opportunity.**



## Performance Consultants as Truth-Tellers: Don't Shoot the Messenger

As a performance consultant and impact investigator, I have learned that telling the truth about measurement is not always easy. I am often asked to measure training's impact after it has already been launched, only to find that no plan was put in place for measurement. I also face resistance from training requestors who say they don't have time to engage in the Workplace Performance Investigation Framework. And sometimes, the most difficult truth to tell is that training is not the right solution. My responsibility is to uncover facts, not assumptions, and validate what can and cannot be measured. Whether I am addressing impact after the fact, navigating time constraints, or guiding business partners toward a more effective solution, truth-telling is essential to my work.

### Truth-Telling: Investigating Impact after the Fact

One of the biggest challenges in impact investigation is being asked to measure the effectiveness of a training program or learning solution already in use. I understand why this happens. A program has been running for months or even years, employees enjoy it, and leadership has heard great things. But the real question remains: how is this training contributing to human and business performance? Without a plan for impact from the start, gathering credible evidence becomes significantly harder. A direct yet professional response to this request could sound like this:

“

*"I appreciate the urgency of this request and your trust in L&D to deliver a solution. Since this training has already been implemented, measuring its impact becomes more difficult without clear performance goals set in advance. We can still explore available evidence to look for signals of impact, but without defined success criteria, it may not be possible to reveal training and learning's contribution in the workplace performance ecosystem. I want to ensure you are aware of this limitation as we move forward."*

As impact investigators, our role is to uncover facts, not create them. Without a workplace performance investigation upfront, we risk searching for evidence that may not exist. While retroactive analysis can offer insights, it is far less reliable than measuring impact with a structured plan. By proactively defining impact and planning measurement, we ensure training programs are designed with clear performance outcomes, making impact investigation less difficult and more possible.

## Truth-Telling: When Time is not On Your Side

One of the biggest challenges in impact investigation is resistance from training requestors who say they don't have time to answer the necessary questions. I understand the urgency they feel. Business moves fast, and when you're moving at the speed of business, decision-makers want solutions as quickly as possible. However, skipping the investigation process in favor of speed over strategy increases the risk of ineffective solutioning. My role is not just to investigate impact. It is ensuring that any solution, whether it includes training or not, is the right one for workplace performance. Here's an example of an appropriate response:

“

*"I know that you need training quickly and may not have time to answer all the questions in the Workplace Performance Investigation Framework. My goal is ensuring that if we invest in training, it delivers measurable results. Without investigating performance needs for the business and our people, there's a risk that training might not be the best solution. If you'd like to move forward without this step, I will support your decision, but I want to be transparent that we may not have the necessary evidence to measure training's impact later on."*

Being empathetic but honest is key. Time constraints are real, but so is the risk of ineffective solutions when we move too quickly without investigation. By positioning the Workplace Performance Investigation Framework as a performance needs analysis that helps uncover business performance needs, we shift the conversation from delays and inconvenience to business value and impact. When training requestors see that investing time in the investigation prevents wasted effort, resources, and ineffective solutions later, they are more likely to engage in the process.

## Truth-Telling: When Training is Not the Solution

One of the most challenging conversations for an impact investigator is telling a training requestor that training is not the right solution. Many business leaders and stakeholders believe that training is the automatic fix for performance issues or business challenges. Their intentions are good, and they want employees to perform better, work faster, or make fewer mistakes. But as impact investigators, we know that performance gaps are often caused by more than just a lack of knowledge or skill. They can be rooted in process inefficiencies, outdated technology, unclear policies, leadership gaps, or broader strategic business issues. Our role is to collect the facts, clues, and evidence that reveal when training is the right solution and when it is not.



A professional, consultative response to a training request where a training program or learning solutions is not an appropriate response might sound like this:

“

*“I appreciate your request for training and your commitment to ensuring employees are set up for success. As part of my investigation, I’ve gathered insights, examined opportunities and challenges, and identified the factors influencing performance. Based on the facts, it looks like the issue may not be best solved by training. Instead, process improvements, technology updates, policy changes, or leadership-driven initiatives could be more effective. I’d be happy to work with you to determine the best approach and focus on a solution that is best for the performance goals you have.”*

By positioning our response with professionalism and evidence-driven insights, we avoid unnecessary tension and keep the conversation focused on solving the real problem or addressing the actual opportunity. The Workplace Performance Investigation Framework equips us to make informed recommendations, ensuring that training is only implemented when it will truly contribute to workplace performance. Truth-telling in these moments reinforces our role as strategic advisors rather than order takers. When we guide business partners toward the right solutions, even when training is not one of them, we strengthen our credibility and ensure that every solution is purposeful, effective, and impactful.

## Truth-Telling: Placing the Ownership of Decisions Where They Belong

Being a performance consultant means telling the truth, even when it’s uncomfortable. It also means making sure that those making the decisions take full ownership. When training requestors choose not to follow best practices, it’s my responsibility to be honest about the consequences. Ignoring this responsibility would be unprofessional and, quite frankly, irresponsible. However, truth-telling is not about resistance or refusing to do the work. It’s about ensuring that decision-makers fully understand the trade-offs when they choose a path that limits the ability to measure or impact performance.

I approach these conversations with tact, respect, professionalism, and a commitment to partnership. There are times when I must move forward with what the training requestor wants, even when I know a training program or learning solution is not the best response. When that happens, I make sure they are aware of the implications. These discussions are not about saying, “We can’t do this,” but rather about setting expectations and ensuring clarity about what is and isn’t possible.

Tactful and professional truth-telling is a critical skill for performance consultants. Approaching these situations the wrong way can damage relationships and credibility. The goal is not to create tension but to establish clarity and manage expectations. When training requestors recognize the potential outcomes of their decisions, they gain awareness that results may not align with their expectations. If they choose to move forward despite our advice, they must own that decision, knowing the risks involved. Our role is to provide expertise, not force compliance. That is what separates order takers from impact makers.

**When training requestors recognize the potential outcomes of their decisions, they gain awareness that results may not align with their expectations.**



## Performance Consulting and Impact Investigation Go Hand-in-Hand

I believe we are performance consultants first and L&D practitioners second. I believe we are performance consultants who support human and business performance needs with training and learning solutions. That belief is what drives how I work and how I think. Everything you've discovered, the Workplace Performance Investigation Framework, Performance Impact Blueprint, AI-assisted strategy, and Instructional Design for Performance Framework, has prepared you for this work. You've been building the mindset and methods of a workplace performance consultant all along. That's not separate from being an impact investigator. That is what it means to be one.

We cannot fulfill our responsibility to contribute to impact if we are not first operating as performance consultants. That is the only way to ensure training and learning are the right response. We must consult before we create and investigate before we recommend. Otherwise, we risk the opportunity to move or maintain performance. That's why I believe performance consulting is the most important skill for anyone who is serious about revealing training's contribution to workplace performance. It positions us to respond with precision, to design with intent, and to deliver with impact.

In the next chapter, you'll see how all of this comes together with the Total Tech & Talent case study. You'll examine the facts and findings for the case study. This is where your work as a performance consultant takes center stage. You'll see how every clue, every insight, and every step of the investigation builds a credible case for the contributions that influence workplace performance. This is the moment when the mystery becomes the message.

## Chapter Review

This chapter reinforced performance consulting as a critical skill for impact investigators. It highlighted the shift from fulfilling training requests to uncovering the truth about what is needed to support workplace performance. With the Workplace Performance Investigation Framework, impact investigators are equipped to analyze business and human performance needs, guide decision-makers, and make informed recommendations. Operating as a performance consultant is essential for designing purposeful learning solutions that contribute to the workplace performance ecosystem.

## Impact Investigator Actions

1. Begin every training request with a performance investigation.
2. Use the Workplace Performance Investigation Framework to uncover performance needs.
3. Guide conversations with curiosity and discovery.
4. Apply abductive reasoning to recommend the most plausible solution.
5. Operate as a performance consultant first and L&D practitioner second.

## What's Next?

We've explored the balance between contribution and isolation. How do we build a compelling case for impact? The final chapter presents the facts and findings that demonstrate collective contributions and their impact in the workplace performance ecosystem.



# 11

## FACTS AND FINDINGS: THE CASE OF COLLECTIVE IMPACT

### Chapter Preview

Throughout this book, we have followed the trail of facts, clues, and evidence to determine training and learning's contribution to workplace performance. Every chapter has sharpened your investigative skills, preparing you for this moment. In this chapter, we will examine:

1. Ways to synthesize impact investigation findings into a compelling case.
2. Real-world examples that reveal collective contribution in workplace performance.
3. The importance of positioning training within the broader performance ecosystem.
4. Strategies for communicating measurement results to stakeholders.
5. Methods for presenting findings with credibility, clarity, and confidence.

### Building the Case for Impact with Collective Contribution

We are ready to bring all our findings together and reveal the impact story. Every technique, mindset, and method you've explored in this book has prepared you to present a complete and compelling case for impact. The goal is not to isolate training, but to show how it works alongside other performance contributors within the workplace performance ecosystem.

This chapter guides you in framing training's role through the lens of collective contribution. You will draw from business performance data, human performance insights, and cross-functional activities that influence outcomes. Rather than attributing success to a single solution, we will build the case for how multiple teams and strategies worked together to the business goal. This is where the rubber hits the road!

With the facts and findings from the Workplace Performance Investigation Framework, Performance Impact Blueprint, and performance-based instructional design strategy, we are now positioned to present training's role with clarity and credibility. Your role is to tell the full story of impact in a way that is truthful, complete, and grounded in evidence.

## How Prior Chapters Led to This Moment

- **Chapter 1** introduced the fundamental question: Does training contribute to workplace performance? It set the foundation for using investigative techniques rather than assumptions.
- **Chapter 2** reinforced the idea that workplace performance is the result of multiple contributors, not just training alone.
- **Chapter 3** provided a structured approach for uncovering facts, clues, evidence to determine training's contribution in the broader performance ecosystem.
- **Chapter 4** emphasized the importance of using business metrics, not just LMS data or surveys, to build a strong case for impact.
- **Chapter 5** demonstrated how to consolidate findings and create a blueprint for how training contributes to business and human performance.
- **Chapter 6** showed how AI can support investigative work by structuring and summarizing insights and enhancing measurement strategies.
- **Chapter 7** detailed how training must be designed with measurable performance outcomes, ensuring that learning experiences are purposefully aligned with business goals.
- **Chapter 8** revealed how AI can enhance the instructional design process, ensuring that learning solutions are data-driven and aligned with performance objectives.
- **Chapter 9** explored the challenges of isolating training's impact versus measuring collective contributions, reinforcing that workplace performance is the result of multiple influences.
- **Chapter 10** reinforced the mindset shift from order-takers to performance consultants and strategic advisors who ensure training is the right solution before implementation.

Now, we'll put what we've discovered practice by examining the case for impact for our case study, Total Tech & Talent.



## Case Study: Facts and Findings for Total Tech & Talent

The launch of the Predictable Talent Plug-In was a pivotal moment for Total Tech & Talent. Leadership focused on maintaining Full Client Status (FCS) performance at 70% while introducing the AI-powered feature. FCS started above goal in the first two weeks of Q3 but dropped below 70% in weeks 4, 5, and 6. To address the decline, the sales team launched a targeted promotion in week 5, which contributed to stabilizing performance. By the end of Q3, FCS was back on target at 71%.

### Q3 12-Week Performance for FCS (Full Client Status): Goal = 70%



## Key Findings

- FCS performance was strong in the first two weeks of Q3, exceeding the 70% target (75% in week 1, 74% in week 2).
- FCS dipped below the 70% target during weeks 4–6, prompting strategic intervention.



- A sales promotion introduced in week 5 helped stabilize performance, returning FCS to 71% by the end of Q3.
- Cross-functional teams played a critical role in supporting associate consultants' performance.
- Ongoing monitoring and empowerment strategies will be essential for sustaining performance.

## Collective Contributions to Goal

Each team played a critical role in maintaining FCS at the 70% target. Below are the specific contributions:

- **Compensation & Benefits** – Provided performance-based incentives for associate consultants.
- **Sales Innovation** – Designed and implemented video-based simulations showcasing client discussions.
- **Product Innovation** – Organized hands-on labs for consultants to familiarize themselves with the new AI feature.
- **Knowledge Management** – Developed a comprehensive knowledge portal for the Predictable Talent Plug-In.
- **Marketing** – Created and executed a promotional campaign to drive product adoption.
- **Learning & Development (L&D)** – Delivered training and reinforcement activities to ensure confident client conversations.
- **Sales Team** – Created a sales promotion with discounted pricing for new clients who purchased the Predictable Talent Plug-In.

## Business Impact

The strategic solutions implemented during Q3 ensured that the Predictable Talent Plug-In launch did not negatively impact FCS in the long term. The sales promotion not only helped stabilize performance but also demonstrated the importance of adaptive strategies when introducing new solutions. Continued refinement of business and human performance strategies will support sustained success.

## Next Step

Each contributor will play an ongoing role in sustaining and improving performance:

- **Compensation & Benefits (Quarterly Review)** – Evaluate the effectiveness of incentives and adjust based on FCS performance.
- **Sales Innovation (Next 90 Days)** – Refine video simulations based on consultant feedback and emerging client interactions.
- **Product Innovation (Q4 2024)** – Gather feedback on the Predictable Talent Plug-In and make necessary refinements for continued adoption.
- **Knowledge Management (Ongoing)** – Expand and update the knowledge portal with real-world case studies and best practices.
- **Marketing (Next 60 Days)** – Assess the impact of the promotional campaign and refine strategies for long-term client engagement.
- **Learning & Development (Ongoing)** – Provide additional reinforcement training and microlearning modules as needed.
- **Sales Team (Next 90 Days)** – Continue gathering client feedback, identifying barriers, and implementing additional sales promotions when necessary.
- **Business Analytics (Ongoing)** – Monitor FCS performance trends and provide data-driven insights to guide future strategies.

## Lessons Learned

- **Proactive monitoring** of FCS trends can help detect early warning signs of performance fluctuations.
- **Coordinated cross-functional efforts** ensure a balanced approach to maintaining business stability during new product launches.
- **Future product rollouts** should include preemptive engagement strategies to mitigate initial performance dips.
- **A combination of solutions from cross-functional teams** is critical for adoption and sustaining performance.

## The Power of Investigating Collective Contribution

The results from this case study highlight how training, incentives, marketing, and other solutions contributed to business performance. Instead of focusing only on learning activity, we gathered real-world evidence showing how multiple teams played a role in achieving the business goal. This approach strengthens the case for impact by connecting performance outcomes to the broader workplace ecosystem. Every piece of evidence adds to the story, demonstrating how collective contributions drive measurable success.

This chapter is the culmination of everything you've learned. The mindset of collective contribution, the message that impact must be investigated within the full workplace ecosystem, and the methods for uncovering and compiling facts have prepared you for this moment. You now have the tools, techniques, and confidence to investigate performance impact and present compelling, evidence-based findings.

Your role as an impact investigator is essential. By applying what you've learned, you are not just measuring training's effect. You are uncovering the full story of workplace performance. You are proving how training and learning as an experience and L&D as a function activates results, drive strategic goals, and contributes to the broader success of the business. This work is powerful, meaningful, and necessary. Now, it's time to put it into action.



## Chapter Review

This chapter pulled together everything we have learned. It reinforced that training's impact is best understood as part of a collective effort rather than an isolated factor. We explored how to structure and present findings using business-relevant language, ensuring stakeholders see training as a contributor to workplace performance rather than a standalone driver. The case study examples demonstrated how multiple teams and influences contribute to business goals, making it clear that training works in tandem with other factors. By presenting measurement findings as part of a broader narrative, impact investigators strengthen the credibility of their work and reinforce L&D's role as a strategic partner in business performance.

## Impact Investigator Actions

1. Compile training's contribution into a clear, evidence-based report.
2. Use business language and metrics to communicate impact findings.
3. Present training as part of a larger performance improvement effort.
4. Highlight real-world examples of how training contributed to business goals.
5. Reinforce the importance of collective contribution when discussing impact.

## What's Next?

You've reached the moment where everything comes together. You've gathered facts, examined clues, and assembled evidence that reveal training's contribution in workplace performance. Now it's time to reflect on what you've learned and how far you've come in your journey as an impact investigator.

In the next and final chapter, I'll share a few last thoughts. You'll revisit the core truths from this investigation, the secrets to success, and the call to action that moves us from theory to action. We've built the case for collective impact. Now, let's close the case with confidence and clarity.



### Closing the Case: What We've Uncovered

As impact investigators, we've spent this journey searching for facts, clues, and evidence to solve one of the most critical measurement mysteries: How do training and learning contribute to workplace performance? Now, we bring this investigation to a close, but not without reflection on what we've discovered.

This book was not about theoretical aspirations for measuring impact. It was about uncovering practical, actionable methods for solving measurement mysteries. It was about shifting from assumptions to evidence, from isolated training efforts to collective contributions, and from being reactive to being proactive in planning for impact. **Through our investigation, we:**

- Defined impact as collective contributions in the workplace performance ecosystem that empower business goals.
- Clarified workplace performance as the combination of business performance and human performance, emphasizing that training is just one part of the broader system of workplace performance.
- Recognized that the workplace performance ecosystem is like a galaxy. It is an interconnected system where elements such as leadership, technology, operations, and training influence and support business goals. Alignment across these elements is necessary for sustained and enhanced performance.
- Established the Workplace Performance Investigation Framework as the foundation for uncovering how training and learning fit into the broader system of workplace performance and how collective contributions drive business outcomes.
- Used the Performance Impact Blueprint to turn our findings into a structured plan for measuring contributions.
- Applied the Instructional Design for Performance Framework to ensure that learning solutions were intentionally designed to activate performance outcomes and align with business goals.
- Examined the pros and cons of isolating impact, recognizing that while control and test groups provide the strongest signal for unique contribution, the broader approach of measuring collective contributions offers a more comprehensive understanding of workplace performance.



- Explored how to be performance consultants by shifting from order-taking to investigative consulting. We examined how performance consulting ensures training is the right solution before implementation, and throughout the book, we reinforced the importance of investigating workplace conditions before making recommendations.
- Presented the case for impact, where the rubber meets the road. This is where we took everything we investigated, structured our findings, and provided the facts, clues, and evidence for impact through the case study.
- Leveraged AI as our investigative assistant, much like Dr. Watson assisting Sherlock Holmes, to enhance and accelerate our ability to analyze performance impact.

These are not just concepts; they are the tools, strategies, and frameworks that will support you in your work as an impact investigator.

## My Secret for Success

At the start of this journey, I shared my secret to success as the L&D Detective®. These guiding principles have shaped the way we approach measurement, and throughout this book, we have brought them to life with real examples and practical application.

The first secret for success is **conducting a performance needs analysis before assuming that training is the answer**. We examined this in Chapter 3 when we introduced the **Workplace Performance Investigation Framework**, which provides a structured way to uncover the root causes of performance issues. In Chapter 5, we saw how skilled impact investigators shift from order-taking to performance consulting by asking the right questions before designing learning solutions. The Total Tech & Talent case study illustrated how an investigation revealed that training wasn't the sole solution. It takes a village to impact workplace performance.

Next, we emphasized the importance of **defining impact before investigating it**. Chapter 2 reinforced that impact is about collective contributions, not just isolated training effects. In Chapter 6, we introduced the **Performance Impact Blueprint**, which ensured that training solutions were designed with a clear performance goal in mind. Rather than retroactively trying to measure learning's effect, we saw how planning for impact from the beginning makes measurement easier and more credible.

We also established that **selecting a business performance metric as the signal for impact** is crucial. Chapter 4 highlighted why LMS data and surveys only tell part of the story, and why business performance metrics provide stronger, more credible evidence. In Chapter 10, we explored the challenges of isolating training's effect and the risks of relying too much on subjective survey responses. Instead, we focused on tracking real performance

movement using business data, which was reinforced in the Total Tech & Talent case study where FCS (Full Client Status) was the chosen business performance metric.

Finally, **aligning with stakeholders on what impact looks like** ensures that everyone agrees on success criteria upfront. In Chapter 7, we explored how AI-assisted tools can help structure impact measurement conversations, and in Chapter 9, we discussed how instructional design can be optimized for performance when stakeholders define what success looks like in advance. The case study in Chapter 11 demonstrated how alignment across teams resulted in a clear measurement plan, ensuring that the investigation had reliable data to support conclusions about impact.

Each of these secrets for success has been embedded in the book, not as abstract concepts but as practical strategies for making impact measurement real and actionable.

## Call to Action: So What, Now What?

Now that you have the investigative tools and methods, the real question is: What will you do with them?

This is your moment to take action. You have the mindset, message, and method to make measurement a reality rather than an afterthought. Here's what I encourage you to do next:

- **Start investigating.** Apply the Workplace Performance Investigation Framework in your next training request. Instead of jumping straight into designing learning solutions, begin with performance questions that uncover the full picture.
- **Use data as your strongest evidence.** Move beyond LMS data and survey sentiment. Identify business metrics that reflect impact in the workplace performance ecosystem.
- **Experiment with AI.** Test how AI can assist in organizing and analyzing information, structuring measurement plans, and refining performance strategies.
- **Educate and influence others.** Help your peers and stakeholders understand the shift from isolated training measurement to collective contribution measurement.
- **Engage with business stakeholders.** Position yourself as a performance consultant who understands not just training, but workplace performance as a whole.
- **Solve measurement mysteries.** Approach each training initiative as an opportunity to uncover clues, analyze evidence, and present a compelling case for impact.

This book focuses on more than just talking about measurement. It provides a method for producing real evidence that shows how collective contributions support business goals.

## Final Words from the L&D Detective®

My sincere hope is that this book has given you confidence, clarity, and courage to make measuring impact more possible and less difficult. I wrote this book for those “in the trenches,” doing the work of measurement in the global training, learning, and talent development community.

One of my goals for writing this book was organizing the thoughts that had been in my head since the first edition of the L&D Detective Kit. I needed to put pen to paper, albeit digital pen and paper, and share my thoughts, ideas, and experiences with you. This book gave me the space to do that. It was important for me to capture those ideas, reflect on how my thinking has evolved, and share them with the people who would benefit the most from me doing so.

I’ve shared my mindset, message, and method. I’ve been honest about the challenges, the complexities, and the realities of measuring training’s contribution. These ideas continue to evolve, just as our work does. My goal has always been to move our profession closer to the truth about measurement and away from idealistic, aspirational, unattainable goals.

Let’s stop spinning our wheels. Let’s stop doing what we know doesn’t work. Let’s move forward with an investigative approach that gives us real evidence for how training and learning contribute to workplace performance.

You have the tools, techniques, and the truth to start investigating impact and I predict that you will be successful. Go forth and be the great impact investigator that you are. We’ve got performance impact measurement mysteries to solve!

## UNCOVER THE TRUTH ABOUT MEASURING IMPACT

Is there proof that training and learning as an experience and L&D as a function contributes to business and human performance? The **L&D Detective Kit for Investigating Performance Impact** empowers you with the mindset, message, and methods to solve performance impact mysteries with facts, clues, and evidence.

This book provides practical and realistic strategies for investigating collective contributions, including but not limited to training, in the workplace performance ecosystem and how these contributions empower business goals. It is an action-driven guide designed to make measuring impact less difficult and more possible.



## GET READY TO SOLVE A MEASUREMENT MYSTERY

Every impact investigation begins with a mystery. Does training and learning truly contribute to workplace performance? Finding the answer requires a keen eye for clues, a sharp focus on evidence, and the right investigative methods. In this book, you will:

- Discover **investigative methods** to uncover facts, clues, and evidence for impact.
- Examine **collective contributions** within the workplace performance ecosystem.
- Build a **compelling case** for how performance is activated and business goals are empowered.

No more guesswork. Just the truth about impact, one clue at a time. Let's get to work!

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## ABOUT THE AUTHOR

**Kevin M. Yates, the L&D Detective®**, is a global authority on investigating the impact of training and learning on workplace performance. With a sharp investigative mindset, he uncovers the truth about how L&D contributes to business and human performance. He uses facts, clues, and evidence to solve measurement mysteries. Through keynotes, workshops, and consulting with organizations worldwide, Kevin equips learning and development professionals with the skills to measure what truly matters. His focus is on uncovering impact with methods that are clear, actionable, and rooted in evidence.