

Implementing MTM: General Guidance and Best Practices

Alan Kully, Explorance
9/22/20

AGENDA

- Implementation Objectives
- Getting Started
- In-Stream
- Q&A

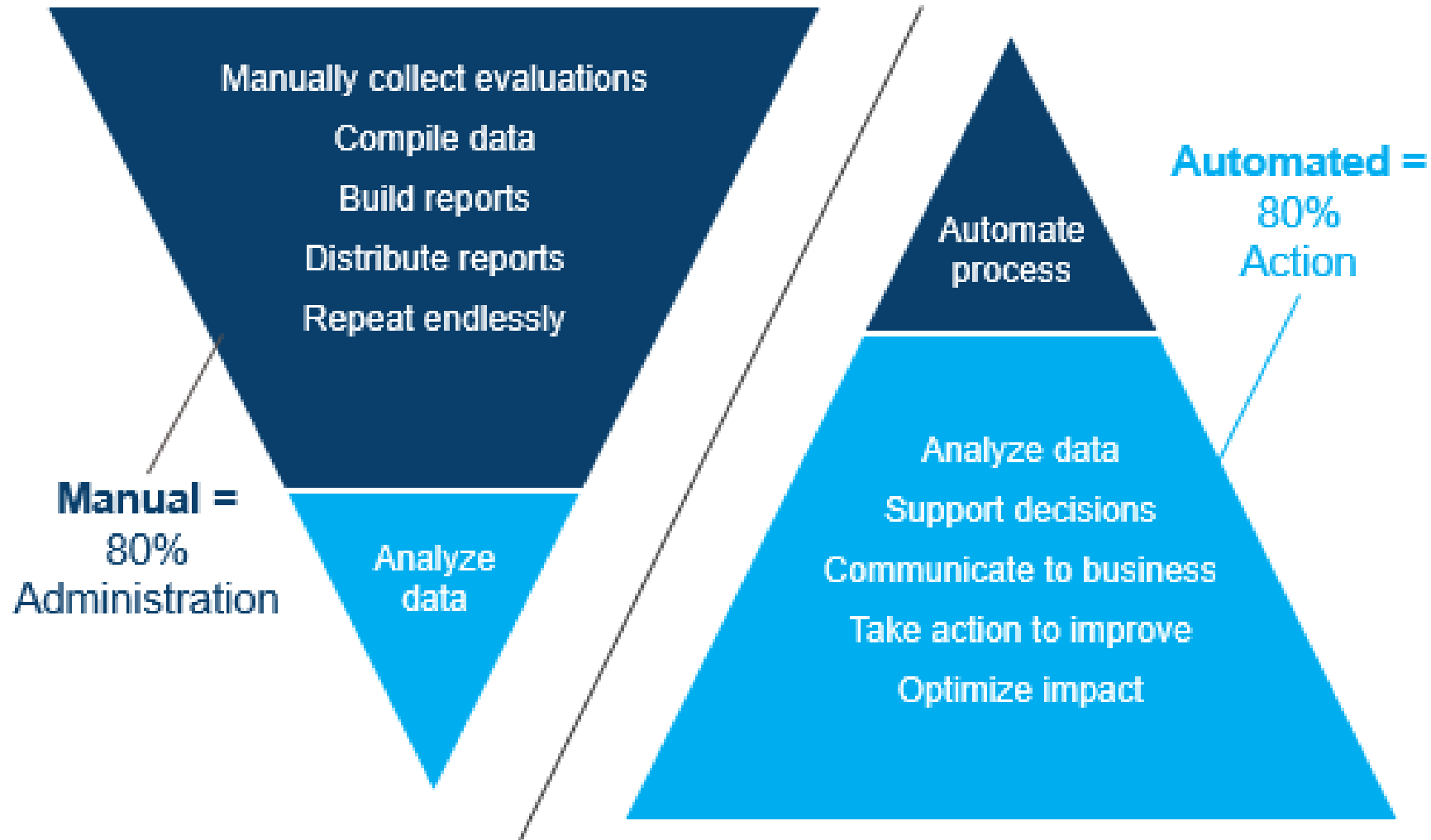
Expectations

- Interactive:
 - Ask questions
 - Share stories
 - Tell jokes

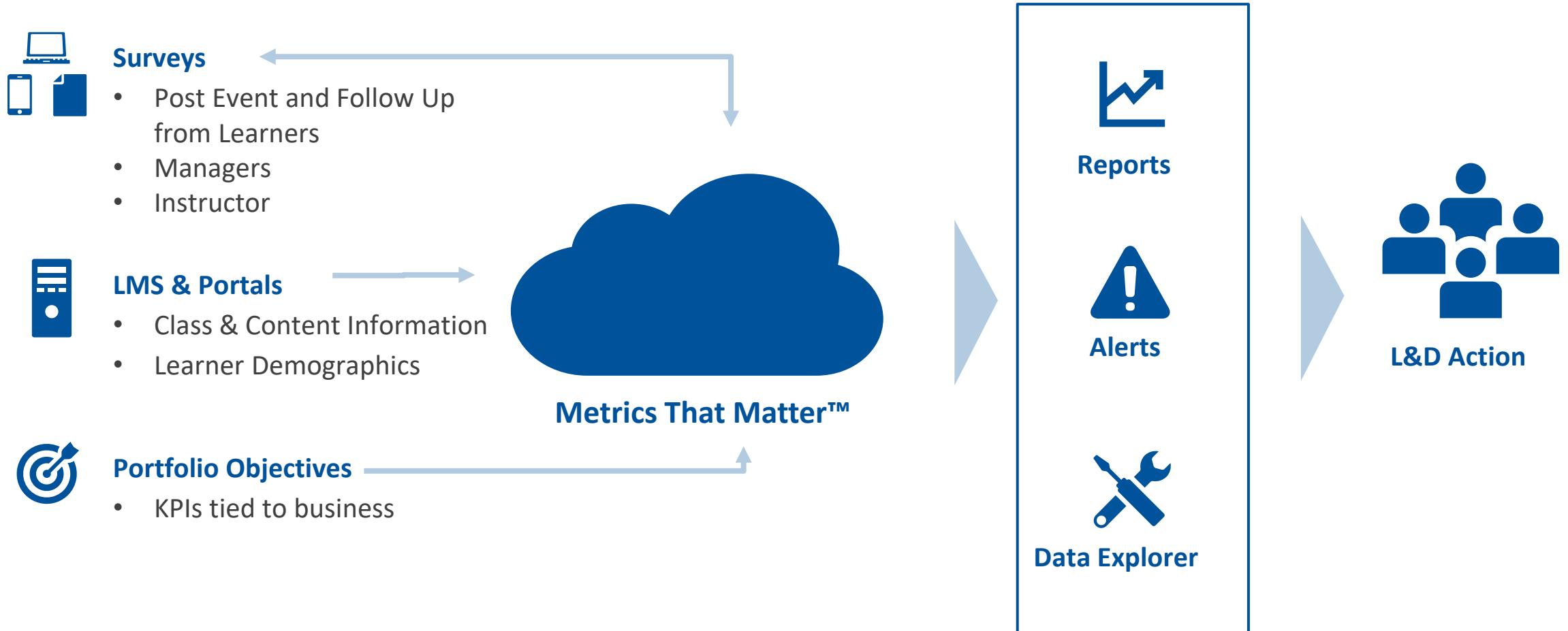
PARTICIPATE

Implementation Objectives

The Value of Automation of the Measurement Process



Automation Means an Effortless Experience



Pre-Implementation

Getting Started

- **Identify Team Members and Roles**

- Sponsor
- Project Manager
- Administrator
- Learning Analyst



- **Identify Trainings to Evaluate**

- Variety of Deliveries
- Multiple Business Units
- Start Small (or BIG)

Implementation

5

COMMUNICATION

From Whom?

- **Leaders/Executives**
- **Development Team/Course & Program Owners**
- **Delivery Team/Instructor Managers**

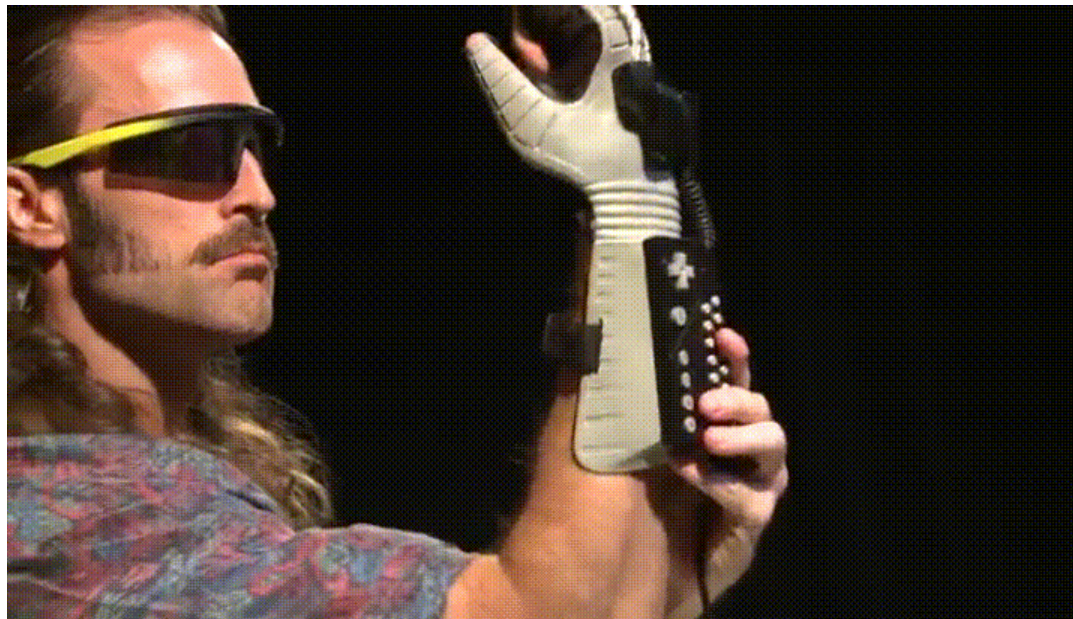


4

COMMUNICATION

With Whom?

- **Instructors/Instructor Managers**
- **Course Developers/Instructional Designers/Instructional Design Managers**







Scheduled Reports by Role

Role	Class Trigger	Monthly	Quarterly	Ongoing Monitoring / Data Exploration
Instructor	Instructor Class Summary		Instructor Performance Report	Instructor Dashboard
Instructor Manager	Instructor Class Summary <i>(triggered for low-scoring classes)</i>	Instructor Performance Summary for team	Instructor Performance Report for each Instructor	Data Explorer*, Instructor Manager Dashboard*
Course Developer / Instructional Designer		Course Summary Report w/Course Level Details, Learner Comment Analysis	Course Summary Report w/Course Level Details	Data Explorer*, Course Owner Dashboard*, Report Card w/Key Driver Analysis
Instructional Design Manager		Course Summary Report <i>(for courses owned by team)</i>	Course Summary Report w/Course Level Details <i>(for courses owned by team)</i>	Data Explorer*, Course Owner Dashboard*, Report Card w/Key Driver Analysis
Learning Analyst / Measurement Champion		Report Card w/Key Driver Analysis, Course Summary Report w/Course Level Details, Learner Comment Analysis	Report Card w/Key Driver Analysis, Executive Summary Report	Data Explorer*, Dashboard*
Learning Consultant		Course Summary Report w/Course Level Details, Learner Comment Analysis	Key Metrics Report <i>(based on priority),</i> Executive Summary Report	Data Explorer*, Dashboard*, Report Card w/Key Driver Analysis <i>(by demographic)</i>
L&D Leader	*Requires direct access to MTM	Report Card w/Key Driver Analysis	Executive Summary Report, Data Analysis Report <i>(prepared by Learning Analyst)</i>	Dashboard*

3

COMMUNICATION

Portfolio Evaluation Model

L&D Value Driver	Business Objective	Leading Indicator	Lagging Indicators
 <p>Maximize Operational Efficiency</p>	<p>Drive bottom-line profitability</p> <hr/>	<p>Productivity Cycle Time Cost Scrap</p> <hr/>	<p>Profit EBITDA</p> <hr/>
 <p>Drive Growth</p>	<p>Drive top-line revenue growth</p> <hr/>	<p>Customer Satisfaction Sales Performance Scrap</p> <hr/>	<p>Revenue Market Share</p> <hr/>
 <p>Mitigate Risk</p>	<p>Cost avoidance: Minimize costs due to non-compliance</p> <hr/>	<p>Safety Risk Avoidance Manager Support</p> <hr/>	<p>Legal Costs Reputational Damage</p> <hr/>
 <p>Build / Maintain Foundational Skills</p>	<p>Cost avoidance: Minimize talent acquisition/turnover cost: "Build vs. Buy"</p>	<p>Job Application Manager Support Learning Effectiveness Quality</p>	<p>Bench Strength Organizational Flexibility</p>

Transform the Conversation



Leading indicators suggest the program will exceed targets for employee productivity increase by 5%.

We recommend shortening the workshop by 1 day, but expanding manager support following the workshop to drive further gains.

2

STANDARDIZATION

Typical Day

THURSDAY	
28	
7 ^{AM}	
8	Build Custom Survey for New Leadership Program
9	Build Custom Survey for Technical New Hire Onboarding Program
10	Build Custom Survey for Sales Conference
11	Build Custom Survey for Manager Excellence Program
12 ^{PM}	Lunch
	Build Custom Survey for Foundations of Performance Management Program
1	Build Survey for Sales Excellence Program
2	Build Survey for Change Management Program
3	Build/Format Report for Effective Leadership Program
4	

THURSDAY	
28	
7 ^{AM}	
8	Build Custom Survey for New Leadership Program
9	Quarterly Data Analysis Presentation Build
10	
11	MTM Class Scheduling
12 ^{PM}	Lunch
1	Cat Videos!!!
2	
3	
4	

Measurement Approaches

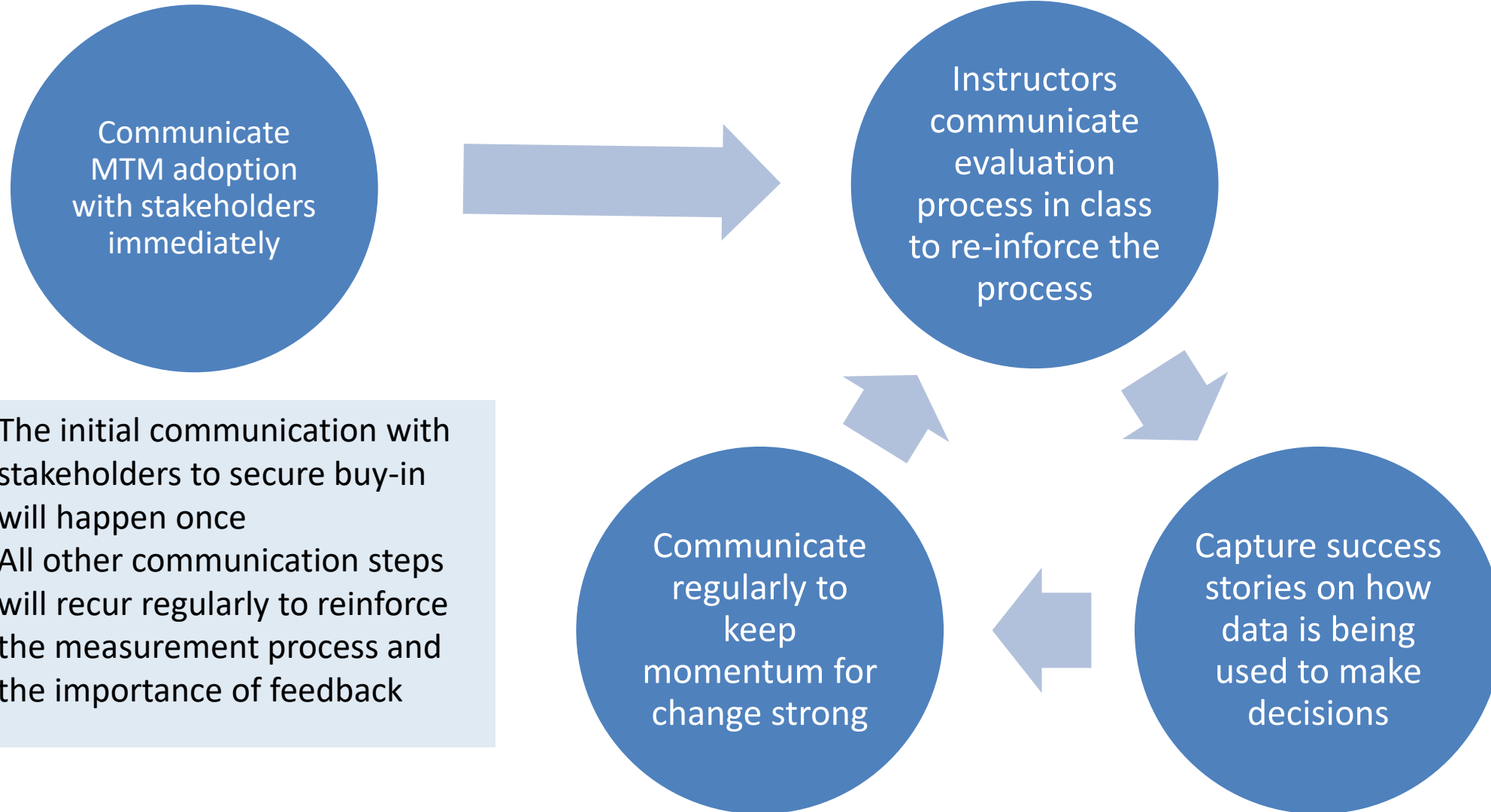
Evaluation models give us a common language to determine the effectiveness of training

Measure	Kirkpatrick	Phillips	Brinkerhoff	Bersin	Reichheld
Level 0		Inputs (Activity)		Efficiency & Adoption	
Level 1	Reaction	Reaction		Satisfaction & Utility	
Level 2	Learning	Learning	Learning	Learning	
Level 3	Job Impact	Application	Application	Individual Performance	
Level 4	Business Results	Impact	Business results, evidence of success	Organizational Performance & Attainment	
Level 5		Return on Investment			
Additional Measures		Intangibles	Support, barriers to application	Alignment	Net Promoter Score

1

COMMUNICATION

Communication and Change Management Cycle

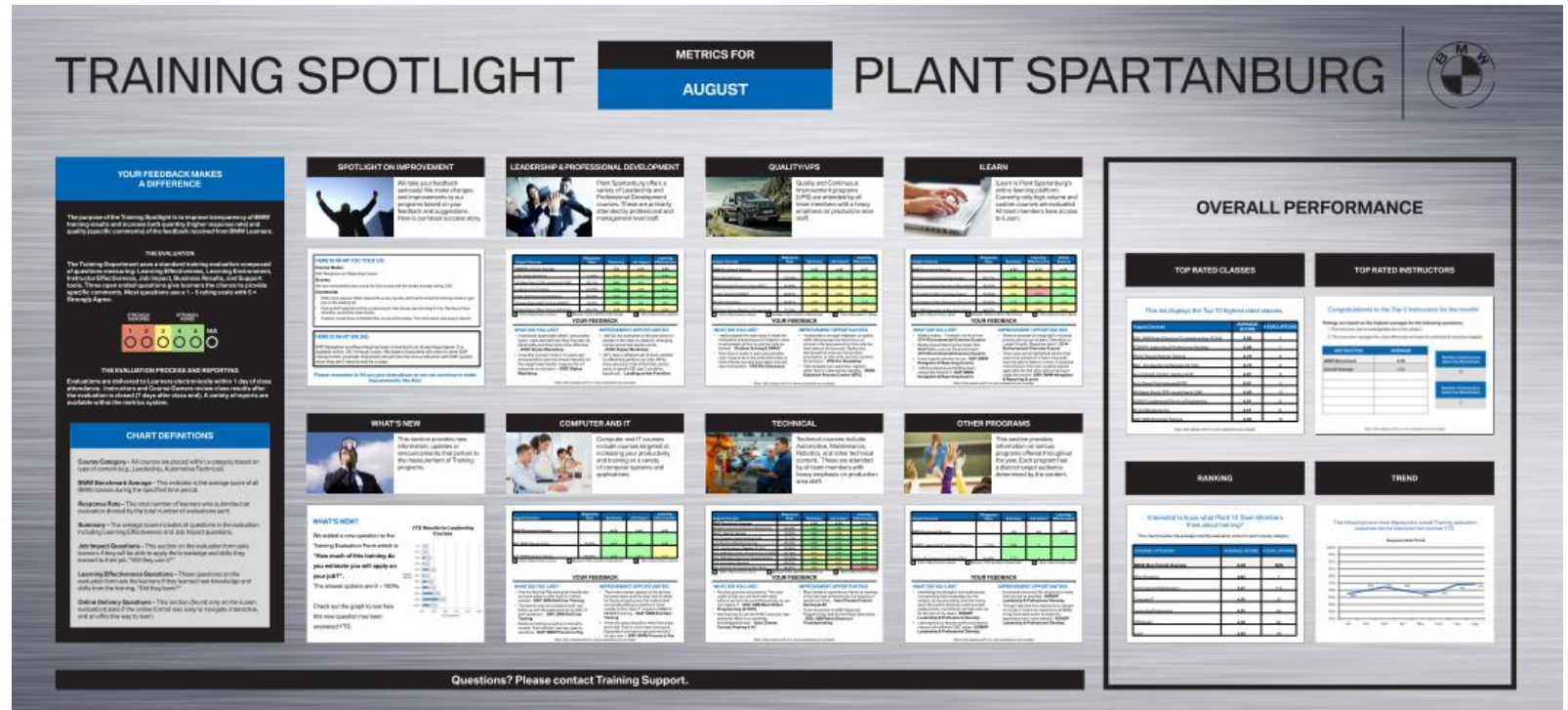


- The initial communication with stakeholders to secure buy-in will happen once
- All other communication steps will recur regularly to reinforce the measurement process and the importance of feedback

Best Practices: Keep Momentum Alive

Use available means of communications to:

- Provide regular progress updates
- Publish outputs of learning metrics
- Continue training and support
- Publish success stories



Recap:

- 5. Communication**
- 4. Communication**
- 3. Communication**
- 2. Standardization**
- 1. Communication**

Questions?



Beyond “Smilesheets”

- Statistically Validated
- Proven to Predict Results
- Supports Accepted Methodologies

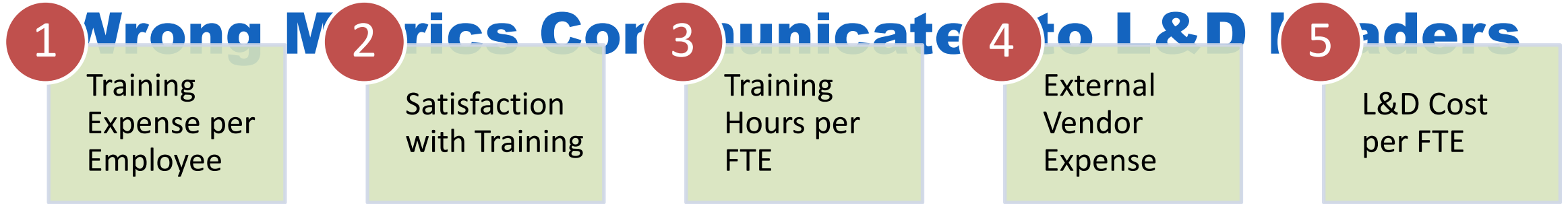
Demonstrate Value

- Business Outcomes Impacted
- Criticality of Training
- Examples of Application
- Job Application
- Net Promoter
- Perceived Value
- Performance Improvement
- Scrap Learning

Drive Continuous Improvement

- Content Quality
- Content Relevance
- Instructor Performance
- Knowledge Gain
- Manager Support
- Organizational Support
- Support Tools/Resources
- Technology Effectiveness

Top 5 Metrics Reported to L&D Leaders



- We delivered 20,000 hours of training
- We spent \$860 per employee
- Satisfaction was 4.7 out of 5
- We think last year's major training program had a 320% ROI

- Limited insight into effectiveness and outcomes in a timely way hinders L&D in making decisions to enable continuous improvement.
- Does not give business executives what they need to gain confidence in their investment of budget and time for L&D programs

KPIs That Most Impact Application and Outcomes

The Predictive Learning Impact Model 2.0

