BEYOND ROI
BE RELEVANT

Training Measurement:
Challenges and Solutions

Taking the Guesswork out of Measurement

Recently, Beyond ROI was invited to join one of our training partner's Client Success Summit to discuss challenges they have in measuring the impact of sales training for their companies. Lindsay Trumpler, Beyond ROI's Practice Manager happily joined the group and shared a presentation, "Taking the Guesswork out of Measurement", that covered the basic concepts of measurement including: why measurement is important, what to measure to get results, and best practices for internal measurement.
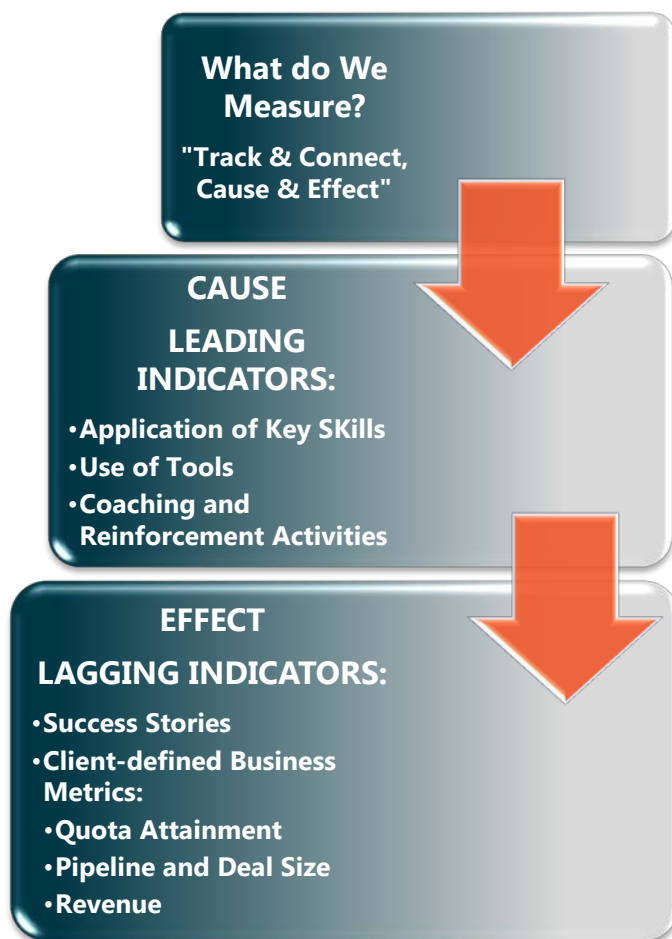
Prior to the Summit, the training partner's clients were asked to submit measurement challenges they are currently experiencing to be tackled. While there were many industries represented at the Summit (High-tech, Financial Services, Professional Services, Manufacturing, etc.) their challenges were all very similar. Some of the concerns the clients expressed were in the areas of gathering and tracking results and measuring success. This article outlines the clients' challenges and Beyond ROI's recommendations for how to overcome them.

Challenge #1: How to Measure Post-Training Behavior Change

The companies represented at the Summit understand that making a commitment to invest in training and developing their sales teams is critical to their organization's success. They invest with the goal of strengthening their sales force and growing their business. These organizations are looking for a quantifiable return on investment. Training professionals and executives alike want evidence that the expenditure of time, talent and money was worthwhile. While many organizations have in-house teams that can crunch the numbers using data from activity measures, many lack the expertise and methodology to truly measure performance improvement and provide credible evidence of impact. Post-training, organizations are often left wondering if the new training approach is working, if

there are challenges in adoption of the new approach, and how specifically the new training approach is impacting business results.

An answer to these challenges may lie in a well-designed, post-training measurement that captures the Behavior Change <u>and</u> Business Impact (Kirkpatrick's Level 3 and 4) of a training program. This measurement also provides accountability for the execution of skills in the field and offers insights for deepening the impact of training programs. Effective performance development must be linked to the goals and objectives of your organization. Data that is used at the executive level to manage business must be aligned with performance development goals. Meaningful measurement requires collaboration. Stakeholders within the training department need to clearly identify the observable behavior changes and work with the sales organization to identify which lagging indicators will be impacted by the new approach. Cooperatively completing this exercise prior to the beginning of a training initiative positions a company to successfully conduct a post-training measurement.

What do We Measure?

"Track & Connect, Cause & Effect"

CAUSE

LEADING INDICATORS:

•**Application of Key SKills**
•**Use of Tools**
•**Coaching and Reinforcement Activities**

EFFECT

LAGGING INDICATORS:

•**Success Stories**
•**Client-defined Business Metrics:**
  •**Quota Attainment**
  •**Pipeline and Deal Size**
  •**Revenue**

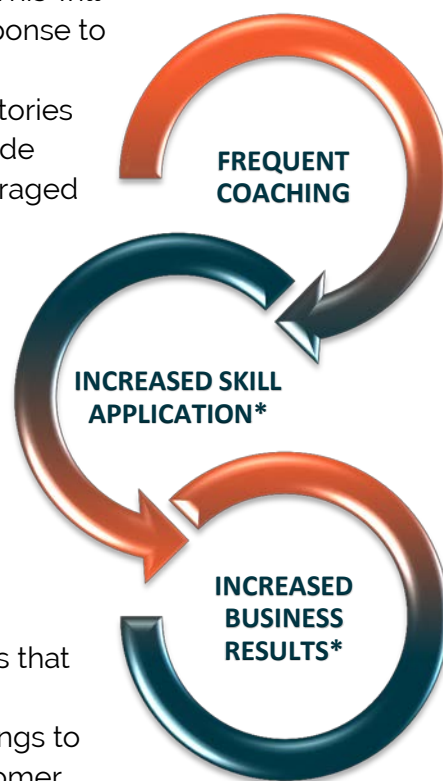Lindsay explained to the group that this is the methodology that Beyond ROI uses during a PowerView™ measurement. The process examines an organization's selected KPIs to provide insights into specific behavior changes and skill improvements that impact those metrics. PowerView tracks both behaviors and outcomes by linking the cause and effect using "leading" (skill application/customer behavior, coaching activity) and "lagging" (pipeline change, average deal size, increase in revenue, etc.) indicators. This two-pronged measurement approach

using "leading" and "lagging" indicators enables us to isolate the effects of training from outside factors and to pinpoint the differences between "high adopters" and "low adopters" in an organization.

The key to obtaining credible measurement results is to accurately assess the level of adoption that has occurred since training. The methodology that BROI recommends is to create a behavioral analysis-type question set. This will measure outcomes by examining customer response to the application of new skills during customer interactions. Also, the RealityCheck™ Success Stories that are collected from survey participants provide specific examples of participants who have leveraged particular skills in an actual opportunity, the customer's response, and the business impact. These stories are excellent sources of best practices and powerful evidence of training impact.

FREQUENT COACHING

INCREASED SKILL APPLICATION*

INCREASED BUSINESS RESULTS*

Challenge #2: How to Get Managers to Reinforce Training

Another challenge that clients had in common is that their sales managers are inundated with responsibilities. On a daily basis there are meetings to attend, results to report, leads to generate, customer relationships to nurture, budgets to monitor, planning for the future, and the list goes on. The manager plays a pivotal role in the success and failure of an organization—and they feel that pressure. The challenge for many managers is finding time to coach with the frequency that increases skill application and, in turn, increases business impact. It is essential that managers make the transition from "ad-hoc" or "on-the-fly" coaching to more strategic coaching that is focused specifically on skills introduced in training. For many executives and training professionals the challenge lies in finding ways to best equip managers to support training initiatives so that when they do have the time to coach, they have the tools they need to be most effective.

> *Our 2014 Benchmark study found that frequent coaching increased skill application by **19%** and high-adopters had **57%** larger closed opportunities than those of low-adopters.*

Our research has found that frequent coaching is directly related to increased skill application. Benchmark studies have shown that managers have a tremendous amount of influence on the continued application of skills and the success of their team. A 2014 benchmark study that included 50 companies and more than 2,000 participants, found that effective coaching increased the continued application of skills up to 19% and that the high adoption of skills led to on average a 57% increase in the size of new opportunities. Based on these research results, Beyond ROI recommends that managers participate in the same training received by their teams. This helps managers become experts of the new approach being learned by their teams.

Finally, to ensure that managers are invested in the training initiative, they should be included in the upfront conversations about the "Why?" of training and how it will impact their bottom line. Senior leadership's communication of the organization's goals creates a shared sense of mission. Managers need to be shown the significance of their role and the part they play in the attainment of business goals.

Challenge #3: How to Support the Individual's Training Needs

"How do we support each individual seller's skill development?" is the most compelling challenge faced by this group and shared by many who support skill development within a sales organization. We know that skill adoption takes place at different rates for different people. There is no "one-size-fits-all" approach to individual support. At the same, attempting to create a specific reinforcement approach for each individual is not time- or cost-effective.

- Pre or post-training application
- Individual skill development action plan
- Overall skill application and skill review by category
- Individual coaching profiles
- Individual Success Stories highlighting application of training

Beyond ROI's recommendation for this challenge is to provide post-measurement results at an individual level. Provide the seller insights into their level of effectiveness for each skill introduced in training and help them use these insights to self-select areas where increasing their effectiveness will make them more successful in their role. This information can become the basis of a powerful coaching conversation that will help create an Action Plan for the seller's development. Beyond ROI provides clients with a MyView™ Individual Coaching Profile to serve as a tool for managers to use to support the development of their team.

SUMMARY

The solutions presented for these common challenges that executives and performance development professionals face, highlights why measuring the impact of training is integral to an organization's long-term success. Measuring goes beyond smile-sheets, yearly performance evaluations, and "same old-same old" training initiatives. Measuring allows you to track the progress of your programs and your people. Progress is movement and though measurement may appear to be an expensive and time-consuming endeavor, taking too narrow of a view of the feasibility, reach and range of measurement, obstructs the view of its value. When measurement is used as a tool for change its value skyrockets. Measurement bridges the gap between performance development goals and business goals, and elucidates their interconnectivity.

About Beyond ROI, Inc.:

Beyond ROI is a third-party measurement firm trusted to deliver meaningful insights to clients who desire to maximize the effectiveness of their marketing and sales strategies. For over 20 years Beyond ROI has successfully measured the impact of training initiatives for local companies, Fortune 500 organizations, and multinational corporations. Our passion is guiding people and businesses to higher levels of success. Beyond ROI offers innovative, streamlined and approachable processes for quantifying training return on investment and helping training companies study how behavior change can translate into business results for their clients. The

definitive value that Beyond ROI delivers is our ability to connect participant skill adoption to business results. We identify the specific money-making skills that high-adopters employ to produce the best business results. These insights, if utilized throughout the organization, can significantly strengthen the impact of training initiatives.

For more information about measuring the impact of training, visit our website at http://www.getbeyondroi.com/