Evaluation for the Real World

Daniel Myers
The Cheesecake Factory
TRAINING EVALUATION FOR THE REAL WORLD
WHO AM I?

Dan Myers, CPLP
Sr. Manager of Staff Training
The Cheesecake Factory

• Built first eLearning module in 2002
• Started managing training departments in 2007
• Made 13,023,356,243 mistakes
TODAY’S SESSION

- Establish a process for evaluation
- Case studies of the evaluation process in different types of projects
5 LEVEL EVALUATION
(YOU PROBABLY KNOW THIS ALREADY)

Level 1
• Reaction: Did they like it?

Level 2
• Learning: Do they know it?

Level 3
• Behavior: Are they doing it?

Level 4
• Results: Is it impacting business performance?

Level 5
• ROI: Is the training worth the money?
WE ALL KNOW THE THEORY, BUT WHAT HAPPENS IN THE REAL WORLD?
REAL WORLD EVALUATION

Level 1
• Reaction: Did they like it?  
   ✔ Smile sheet!

Level 2
• Learning: Do they know it?  
   ✔ Quiz at the end!

Level 3
• Behavior: Are they doing it?  

Level 4
• Results: Impacting business performance?  

Level 5
• ROI: Is the training worth the money?  

Smile sheet!
Quiz at the end!
I heard some anecdotal feedback…
I dunno, probably?
I’m really busy with this next project.

I’m really busy with this next project.
EVALUATING THE L&D FIELD

Levels 1 & 2
Let’s assume you’ve got this.

Levels 3, 4 & 5
We’ll spend our time here.
WHY DO WE STRUGGLE WITH EVALUATION?
LET’S EXPLORE L&D PROJECTS FOR
SkyHigh Airlines

The preferred fictional travel partner of Learning Solutions Conference
ARE THESE SKYHIGH AIRLINES L&D PROJECTS ALL CREATED EQUAL?

**Gate Change Job Aid**
- 3 meetings
- 6 hours work
- $50 printing
- Distribute to 500 people

**Booking Software eLearning Module**
- 3-5 weeks work
- 13 minute course
- 150 learners
- 6 month shelf life

**Compliance Course**
- Off the shelf compliance course
- 4-6 weeks of customization
- $17,500 annual license

**2 Day New Manager Workshop**
- 3-5 months work
- ILT w/eLearning
- Pre-work
- Repeated Quarterly
- Training for all newly promoted managers

**Curriculum Overhaul**
- Current training for Flight Attendants is over a decade old.
- 18 month project to completely overhaul 50+ hours of training

**Service Brand Strategic Imperative**
- Company wide initiative to change culture of customer service
- C-Suite Request
- 18 month project
- Multiple deliverables and methodologies
IS IT WORTH A 5 LEVEL EVALUATION FOR THIS PROJECT?

- Level 1: Reaction
- Level 2: Learning
- Level 3: Behavior
- Level 4: Results
- Level 5: ROI

Gate Change Job Aid
- 3 meetings
- 6 hours work
- $50 printing
- Distribute to 500 people
WHAT ABOUT THIS PROJECT?

Level 1 • Reaction
Level 2 • Learning
Level 3 • Behavior
Level 4 • Results
Level 5 • ROI

Booking Software eLearning Module
• 3-5 weeks work
• 13 minute course
• 150 learners
• 6 month shelf life
WHAT’S THE ROI ON FINDING ROI?
EVALUATION PROCESS

1. Determine if evaluation is necessary.
QUESTION
Will you do anything with the evaluation results?
WHAT WILL YOU DO WITH THESE EVALUATION RESULTS?

Level 1
• Reaction

Level 2
• Learning

Level 3
• Behavior

Level 4
• Results

Level 5
• ROI

What if this is the first of 12 software modules to support a multimillion dollar company initiative?
That will cost a lot of time and money. Let’s do a pilot with 50 employees first to see if it gets results.

We need to put 7,500 hourly employees through a new Customer Service program.
EVALUATION PROCESS

1. Determine if evaluation is necessary.
2. Determine what you will do with the results.
3.
4.
5.
6.
7.
8.
9.
10.
WHAT’S WORTH MEASURING?

Level 1
- Reaction  

Level 2
- Learning

Level 3
- Behavior

Level 4
- Biz Results

Level 5
- ROI

Does it really matter if learners don’t like learning about FAA rules?
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4.
5.
6.
7.
8.
9.
10.
QUESTION
Are you doing an Analysis phase?
Analysis phase?!?!?

What is this 2004?

Don’t you know that SAM/Agile/Rapid prototyping are all the rage?
WARNING!
NON-ACADEMICALLY SUPPORTED PHILOSOPHY

• Agile/Rapid Development?
  – Levels 3-5 not needed

• Analysis Phase?
  – Full level 1-5 evaluation

*No professors were consulted in the development of this conclusion.
WHAT Requires a FULL ANALYSIS PHASE?

Gate Change Job Aid
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Service Brand Strategic Imperative
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YES, IT’S A BIG PROJECT THAT NEEDS ANALYSIS, WHAT NEXT?
Evaluation starts in the analysis phase
STAKEHOLDER ANALYSIS QUESTIONS

HR Director: We need a workshop for all new managers!

VP of Ops: We need to overhaul this old Flight Attendant curriculum.

CEO: Our brand has an image problem. We need to create a new culture around customer service.

Ask questions like:
• What is the root problem you are trying to solve?
• What behaviors are you trying to change?
• What is the performance objective?
• What are the business objectives?
• What is the current cost to the business?
• What does success in this project look like?
• Etc.
THOSE SOUND KIND OF LIKE LEVELS 3-5...
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4. Focus on Evaluation during Analysis
QUESTION

Are you looking at data in the analysis phase?

HINT: You should be.
ANALYSIS PHASE
NEW MANAGER WORKSHOP

Depending on the business opportunity that is the focus of the project, you may explore:
- Engagement scores of teams with new managers
- Number and type of HR issues
- Turnover data
- Time to promotion for next level of management
- Operational metrics of new managers
- All of the above and more
ANALYSIS PHASE
CUSTOMER SERVICE STRATEGIC IMPERATIVE

Possible areas being explored:

- Customer service survey scores
- Yelp or other online reviews
- Average time on hold
- Secret shopper scores
- Number of customer complaints
- All of the above and more

Service Brand Strategic Imperative

- Company wide initiative to change culture of customer service
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WHAT DID YOU FIND IN ANALYSIS?

Analysis Data

<table>
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<tr>
<th></th>
<th>Current State</th>
</tr>
</thead>
<tbody>
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<td>Average Customer Service Score</td>
<td>6.8</td>
</tr>
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<td>Number of 3 star or lower Yelp reviews/month</td>
<td>19</td>
</tr>
<tr>
<td>Average hold times</td>
<td>9 min 24 s</td>
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<tr>
<td>Secret shopper scores</td>
<td>57 out of 75</td>
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<td>Complaints per 10,000</td>
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</table>

Service Brand Strategic Imperative

- Company wide initiative to change culture of customer service
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CONGRATULATIONS YOU HAVE BASELINE DATA!
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4. Focus on Evaluation during Analysis
5. Find your baseline(s) during Analysis
YOU CAN’T EVALUATE IMPROVEMENT IF YOU DON’T KNOW WHERE YOU STARTED
## Stakeholder Expectations

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### Service Brand Strategic Imperative

- Company-wide initiative to change culture of customer service
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BE REALISTIC ABOUT WHAT METRICS YOU CAN INFLUENCE

- Customer service training won’t impact:
  - Issues with weather
  - Maintenance delays
  - Billing problems
  - Staffing levels at a call center
  - Technical glitches
  - Etc.
ALIGN ON REALISTIC EXPECTATIONS

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EVALUATION PROCESS

1. Determine if evaluation is necessary
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4. Focus on Evaluation during Analysis
5. Find your baseline(s) during Analysis
6. Establish realistic success criteria
7.
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**WHAT EVALUATION LEVELS ARE REPRESENTED HERE?**

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EXECUTIVES MAY SKIP PAST LEVEL 3

That’s great but is it reducing customer complaints? Are actual customers happier?

We’re seeing a huge improvement in secret shopper scores…
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4. Focus on Evaluation during Analysis
5. Find your baseline(s) during Analysis
6. Establish realistic success criteria
7. **Focus most of your effort on Level 4**
8.
9.
10.
EVALUATING BEHAVIOR

Why can’t we just skip level 3 and go straight to level 4 if that’s what stakeholders are most interested in?

• Sometimes you can.
• Sometimes the learner population is too small to prove “Results.”
• Business “Results” can be attributed to MANY factors and it’s almost impossible to isolate training.
• Behavior data tells YOU if YOUR work is making a difference.
• Sometimes behavior IS the focus.
WHAT IF I DON’T HAVE ANY BEHAVIOR DATA TO ANALYZE?

Make some.
SURVEYS AREN’T JUST FOR SMILE SHEETS

Airline Call Center Customer Service Analysis:
• Need to know where to focus the program
• Survey of all the Call Center supervisors
• Rate 1-10 on against a clearly defined criteria
• Collect detailed data that forces the population to provide granular answers
<table>
<thead>
<tr>
<th>Topics</th>
<th>1</th>
<th>2</th>
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<th>6</th>
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<td>Changing Flights</td>
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</table>
HOW CLOSELY DO CALL CENTER AGENTS FOLLOW CUSTOMER SERVICE SCRIPTS DURING THESE TIMES AND EVENTS?

<table>
<thead>
<tr>
<th>Time Periods</th>
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</table>
## ANALYSIS PHASE DATA

### Topics and Scores

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<tr>
<th>Topics</th>
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<tbody>
<tr>
<td>Changing Flights</td>
<td>8.6</td>
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DATA DRIVEN APPROACH TO DETERMINE FOCUS FOR PROGRAM

- Baggage issues
- Flight cancellations
- First class upgrades
- Communicating with tired travelers
- Rebooking during weather events
- Service during high volume periods
### THIS IS ALSO BEHAVIORAL BASELINE DATA

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NOW I KNOW WHAT BEHAVIORS TO FOCUS THE TRAINING ON AND I HAVE MORE BASELINE DATA
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4. Focus on Evaluation during Analysis
5. Find your baseline(s) during Analysis
6. Establish realistic success criteria
7. Focus most of your effort on Level 4
8. Employ method used to determine which behavior(s) to focus on to assess improvement
9.
10.
PROGRESS THUS FAR

Level 1
- Reaction: Did trainees like it?

Level 2
- Learning: Do trainees know it?

Level 3
- Behavior: Are trainees doing it?

Level 4
- Results: Impacting business performance?

Level 5
- ROI: Is the training worth the money?

Survey!
Quiz!
1/2 Baseline data from analysis
1/2 Baseline data from analysis
?
LEVEL 5 – THE BOTTOM LINE

Why can’t we just skip level 5 if we have 1-4?

• Sometimes you can.

• Sometimes executive stakeholders want it.

• Sometimes you need to justify expending resources and/or labor.

• Sometimes you need to justify your job/department.
But I'm not an accountant!

Can't someone else do that?

I don't trust myself to put financial numbers in front of executives.
**Strategic Imperative**
- 18 month project
- C-Suite request
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**Use Level 4 to Determine Level 5**

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Can we quantify what these Business Results would mean financially?
LET’S ASK THE FINANCE EXPERTS!

• You’re not alone!
• Ask your financial team for help quantifying ROI.
• Your stakeholders are more inclined to believe numbers from Finance than from L&D/Training.
Sorry, we’re really busy in the finance department.
Each 0.1 improvement in customer service scores means on average an increase of 46 customers per month resulting from positive word of mouth and repeat business. Each customer represents $750 and 46 customers equals $34,500 in monthly sales or $414,000 annually.

On average, each customer complaint costs the company $1,463 from a combination of lost productivity, call center labor, refunds and loss of future business.

What is the financial value of improving customer service by 0.1 point?

What is the average cost of a complaint?
TRANSLATION

• Save $414,000 per year by going up 0.1 points in customer service
• Save $1,463 by reducing one complaint
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4. Focus on Evaluation during Analysis
5. Find your baseline(s) during Analysis
6. Establish your success criteria
7. Focus most of your effort on Level 4
8. Employ method used to determine which behavior(s) to focus on to assess improvement
9. Leverage other departments to determine Level 5
10.
PROGRESS THUS FAR

Level 1 • Reaction: Did trainees like it? ✔️ Survey!

Level 2 • Learning: Do trainees know it? ✔️ Quiz!

Level 3 • Behavior: Are trainees doing it? 1/2 Baseline data from analysis

Level 4 • Results: Impacting business performance? 1/2 Baseline data from analysis

Level 5 • ROI: Is the training worth the money? 1/2 Know incremental value of improvement from analysis
ANALYSIS IS COMPLETE

Build and rollout your program
TRACK PROGRAM COSTS
PROGRAM COSTS

- Printing
- Shipping
- Travel
- Software Licenses
- Learner/Participant Labor
- L&D Department Labor

Strategic Imperative
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$225,000
Compare Analysis data to Post Implementation Data
## COMPARE TO BASELINE AND TARGET

### Strategic Imperative
- 18 month project
- C-Suite request
- Company wide initiative to change culture of customer service
- Multiple deliverables and methodologies

### Level Metric Analysis

<table>
<thead>
<tr>
<th>Level</th>
<th>Metric</th>
<th>Analysis Baseline</th>
<th>Stakeholder Target</th>
<th>Post Training Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Secret shopper scores</td>
<td>57</td>
<td>65</td>
<td>63 +8</td>
</tr>
<tr>
<td>4</td>
<td>Complaints per month</td>
<td>137</td>
<td>110</td>
<td>124 -13</td>
</tr>
<tr>
<td>4</td>
<td>Average Service Score</td>
<td>6.8</td>
<td>7.5</td>
<td>7.7 +0.9</td>
</tr>
<tr>
<td>5</td>
<td>Value of Complaint Reduction</td>
<td>-1 = $1,463/month</td>
<td>$228,228 per year</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Value of Service Score Improvement</td>
<td>+0.1 = $414,000</td>
<td>$3,726,000 per year</td>
<td></td>
</tr>
</tbody>
</table>

**Project Gain – Project Cost**

$228,228 + $3,726,000 - $225,000 = $3,729,228
EVALUATION PROCESS

1. Determine if evaluation is necessary
2. Determine what you will do with the results
3. Know what is worth measuring
4. Focus on Evaluation during Analysis
5. Find your baseline(s) during Analysis
6. Establish your success criteria
7. Focus most of your effort on Level 4
8. Employ method used to determine which behavior(s) to focus on to assess improvement
9. Leverage other departments to determine Level 5
10. Compare results to analysis baseline and target
THANK YOU!
Please Complete Your Evaluation

Questions?