

Learning Lab facilitated by Vantage Partners

Spring 2020 | March 30, 2020

Quick Recap Notes and Takeaways

Thank you to all who participated in our peer-to-peer discussion of “Learning Data Analytics: Metrics, Measurement and Analytics for Training Organizations.” With strong participation and engagement, we were able to transition our planned morning-long workshop at the Hotel Commonwealth into a 90-minute virtual workshop. A special “Thank you!” goes out to those who volunteered to prepare, share, and present—including Sharon Claffey Kaliouby, our featured guest from Learning Pool.

Let’s continue this important discussion. Vantage Partners will continue to share insights on this topic, and encourage you to follow up with us, and with others you met through this event.

We look forward to reconvening this growing community of L&D peers on June 22, 2020—at the Hotel Commonwealth in Boston, or virtually as our fallback plan. Our next Learning Lab facilitated by Vantage Partners will discuss “Building Resilient Organizations: The Pivotal Role of Learning & Development.” Please reach out in advance if you have thoughts, approaches, and tools to share on this topic.

— Danny Ertel, Partner

Welcome and Introductions



Learning Lab Spring 2020 Agenda

9:00 am	Welcome and Introductions
9:10 am	Presentation: Learning Data Analytics: Metrics, Measurement, & Analytics in the Workplace
9:20 am	Breakout Discussions: Where are you in your LDA journey?
9:45 am	Presentation: An Example from Practice
9:50 am	Measuring Things That Are Difficult to Measure
9:55 am	Group Discussion: How can we use operational data (not just LMS data) to help us uncover opportunities and design new learning journeys?
	Presentation: Another Example: Learning Portfolio Scorecard
10:20 am	Wrap-Up Discussion
10:30 am	Conclusion of Workshop

Why did you decide to attend today’s event on the topic of learning data analytics?



Learning Data Analytics: Metrics, Measurement & Analytics in the Workplace

Sharon Claffey Kaliouby
VP North America, Learning Pool

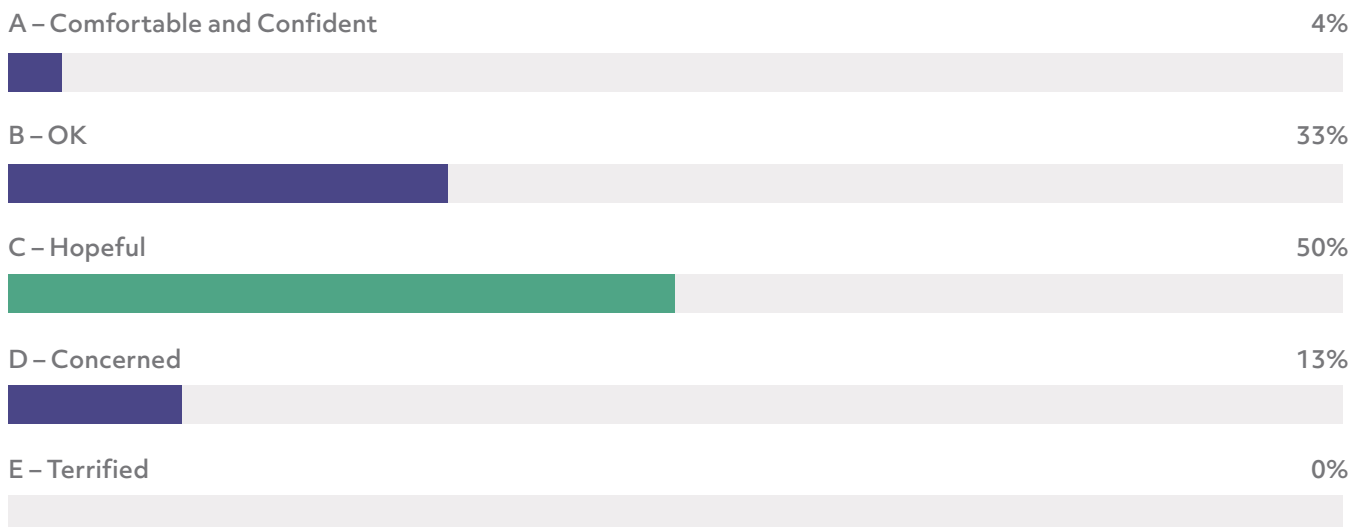
What Is LDA?

How do you define LDA?"



Participant Poll

As an L&D Leader, how are you feeling about LDA and its apparent surge?



Learning Data Analytics

Learning Data Analytics is the measurement, collection, analysis and reporting of data about learners and the environments (business moments) in which it occurs. Ideally this data leads to actionable insight which includes better, faster and more credible business decisions.

- A key element in this definition of LDA is that it includes actionable insights. LDA enables a more credible engagement and validation of L&D efforts. (The sexiest job in the 21st century is considered data analytics. Partnering with others who have data analytics in their business is a big plus.)
- Another LDA definition comes from the Kirkpatrick model. Rooted in defining levels 1-5. ROI became the Kirkpatrick Level 5.

"We call it the chain of evidence. You get evidence on Level 1 that they liked the program – they thought it was practical; Level 2 that they learned the knowledge, skills and attitudes; Level 3 that they changed their behavior; and Level 4 that you're going to get the results from it."

- 2009 Donald Kirkpatrick interview with Chief Learning Officer



Learning Data Analytics

It is the addition of a Level 5 Return On Investment (ROI) which best aligns to today's LDA.

The evidence leverages the people analytics to drive this business strategy. This is lofty but it is attainable, if there is a clarity of understanding on all components of the data and analytics.

LDA Drivers (and Resisters): Why It's Hot Now, What This Means for L&D and Workplace Learning

What was NOT hot in 2018



What's HOT in 2020

GSS 2020	
1.	Learning analytics (3)
2.	Personalization/adaptive delivery (11)
3.	Collaborative/social learning (4)
4.	Learning experience platforms (6)
5.	Artificial intelligence (2)
6.	Micro learning (5)
7.	Consulting more deeply with the business (9)
8.	Coaching/mentoring (-)
9.	Showing value (10)
10.	Virtual and augmented reality (7)
11.	Performance support (11)
12.	Mobile delivery (8)
13.	Neuroscience/cognitive science (12)
14.	Curriculum (14)
15.	Video (13)
16.	Other: (16)
Votes 2020: 6,591	



- Top five slots in this Don Taylor survey have to do with data analytics. In two years, this went from slot 25 to number one.
- We're looking to drive and deliver value outcomes; this is more in alignment with digital transformation many organizations are experiencing.
- We should want people coming to L&D because they see us as valuable partners. You want to get to where the data is being driven from, in addition to the C-suite.
- Biggest LDA resistor is people saying they have no budget

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Officer*

learningpool

- Traditionally we might have looked at dashboards about our programs. LDA will enable us to focus on what is personalized to the learner.
- What's different now is that with machine learning and AI, we can figure out how to take content and make it more useful. The "aha" moment is to use AI to add more intelligence. By adding machine learning to understand the value of the content, you put greater emphasis on communication and dialogue.
- For sales enablement especially, this is critical. Recognizing not just who is contributing a lot of content, but whose participation is adding value to others, will allow us to be very sharp and in tune with business needs.

The LDA Journey: Experience with LDA for ROI and Improved Training

Breakout Discussions: *Where are you in your LDA journey? How are you thinking about using data and analytics to assess ROI of training and/or improve the training itself?*

Group 1 Readout:

- The group focused on questions about driving L&D within Sales development. Whether you can do A or B testing, for example, where certain groups are trained and others are not. The goal is to prove the value of training. One company saw three times the impact to revenue coming out of North American teams vs. some teams in Europe that were accidentally left out of the training roll out.
- Another idea was to test effectiveness around different product launch timelines.

Group 2 Readout:

- One case study highlighted confidence in measuring impact of learning internally, and the desire to focus on external impacts of training, in terms of advocacy for the organization, and individual employees' impact on customer experiences and perceptions.
- How is the learning that we're delivering impacting the adoptions of our solutions? What is the business impact? Does that data even exist? And if it does, it needs to be aligned similarly so we can do the mapping.

Group 3 Readout:

- We're all early in the journey. "Butts in seats metrics are okay, but don't get you to where you need to be."
- Have some assessments in place to understand how L&D impacts the bottom line. Would be interesting to see how this can then be further used to improve performance.

Group 4 Readout:

- Group participants discussed new methodologies for learning evaluation. Looking at things like awards and how they're baking this into the solutions.

- One of the companies is a risk management solution provider. Trying to get out ahead of these changes to think about what will be innovative.
- Applicability to compliance training: LDA should help us determine whether someone with 20 years' experience even really needs training to be at 100% compliance.

Group 5 Readout:

- L&D team at one organization is growing. Really focused on investment now, and sharing impacts of trainings with the business.
- Also focused on improving the experience of the trainings, and partnering (with Vantage) on pre- and post-training evals, and making use of Qualtrics to compare workshop results and extract lessons learned.

An Example from Practice: L&D Job Aide

- 6 Ds model defined performance expectations; if you know those, how do you design your L&D intervention and deliver on it?
- Next piece is the drive – contract done through leadership. We aligned it with development process and Kirkpatrick, so we had a practical approach.
- Whatever you're developing needs to have connection to the business impact. Everyone goes through the 6D training course now.
 - Working backwards to get the business outcomes and criteria for success is crucial. At our company, we're not into the process and steps. Previously, we used 6 boxes (methodology); this [6 Ds] methodology works backwards also and works very well in highly process-driven functions and organizations
 - Other frameworks some are using: BADIR framework (Business questions, Analysis plan, Data collection, derive Insights, Recommendation)

Measuring Things That Are Difficult to Measure


What kind of indicators can we use to understand and optimize our success?

Danny Ertel, Vantage Partners

A word of caution—we need to be thoughtful about purposes and audiences. Are we sharing “dials” that can be turned, or “gauges” that report effects? Very easy for data to be misinterpreted, or be heard differently by different audiences. Reminder that we want to measure, not ignore important signals. But just because something is quantifiable it doesn't mean that it's the most important thing or only thing that counts. Metrics are a means, tool, and part of the answer. Without a good dialogue with the business then it's just noise.

Purposes of Metrics and Dashboards

- Dials vs. Gauges
- Communications: intended and unintended
- Audience and Purposes
 - ▶ Governance and oversight
 - ▶ Budget allocations
 - ▶ Functional management
 - ▶ Change management
 - ▶ Stakeholder buy-in
 - ▶ ?

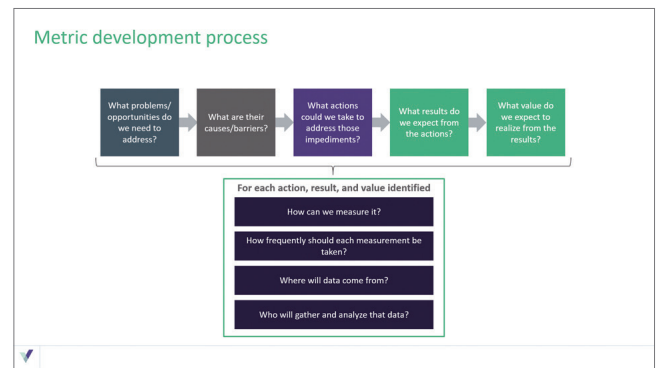


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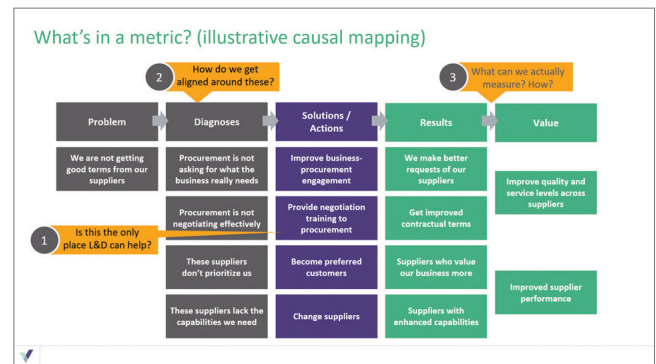
Keep in mind...

- “Not everything that counts can be counted, and not everything that can be counted counts.”
— William Bruce Cameron
- “You can't manage what you can't measure.”
— Peter Drucker
- “... Lies, damned lies, and statistics.”
— Benjamin Disraeli
- “The best leaders work the zoom button in both directions... They can zoom in to see problems while zooming out to look for similar situations, root causes, and principles or policies that will help prevent the crisis from recurring.”
— Rosabeth Moss Kanter

- There are many ways to develop metrics and dashboards. What is critical is to understand the business problem and what we think may be causing it (or getting in the way of solving it), so we can test and measure whether the steps we are taking to address the problem are delivering the expected results and corresponding value.
- Before we get too deep into indicators, we need to be clear about how we are measuring it, who will gather the data, when, etc. Data can be called into question if we haven't been thoughtful about how we manage it.



- Supply chain example [causal mapping example]:
“We’re not getting the right kinds of terms from suppliers.” Depending on what we think are the causes, we’ll come up with some actions that have value.



Looking at this causal map, how else can L&D help address these causes?



Alignment with the business on these hypotheses is critical. Are we clear what we are solving for? Ask your internal client what they're looking for a year from now. Causes a business to take pause, and if they can't define success today, they won't think L&D helped later.

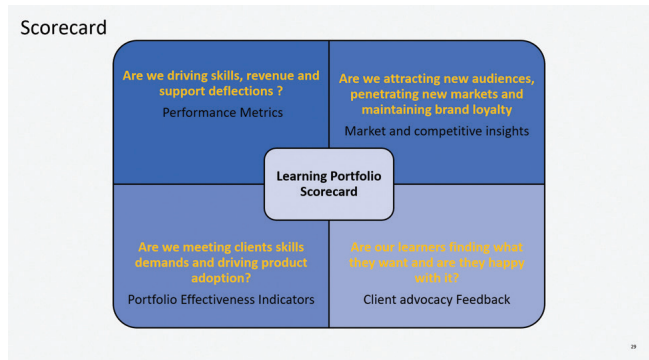
Harnessing Data to Drive the L&D Agenda

How can we use operational data (not just LMS data) to help us uncover opportunities and design new learning journeys?

Another Example: Learning Portfolio Scorecard

- Last year at our organization we went through a learning transformation looking at credentials, go-to-market, content, marketplace. One thing we focused on was content, because learning starts here. We needed to give business units a tool to evaluate the health of their portfolio.
- Went back to offerings management, with a scorecard for offerings. Built out a learning portfolio scorecard for learner-driven analytics and market-driven insights.
- What's really behind this is the holy grail of consistent taxonomy. How do we map data from Salesforce with data our training organization has? Do they have the same basis for a one-on-one comparison?
- How does a learning portfolio help? Look at historical performance and provide predictive metrics for the business.
- We mapped these metrics to things that we're measuring today.
- You can look at the scorecard and say, "here's how product revenue maps against learning." Can we correlate how education is driving product revenue?

4 Questions		
What we are measuring	Original Question	Learning related question
Performance Metrics	Are we driving results?	Are we driving skills, revenue and support deflections?
Market and Competitive Insights	Are we gaining meaningful market presence?	Are we attracting new audiences, penetrating new markets and maintaining brand loyalty
Sales and Marketing Effectiveness Indicators	Are we generating demand and closing deals effectively	Are we meeting clients skills demands and driving product adoption?
Client Advocacy Feedback	Are we surpassing client expectations?	Are our learners finding what they want and are they happy with it?



What does your regular engagement with business units look like?

We're very heavily engaged; we have business unit relationship managers who talk with BUs on an ongoing basis. We are the central governance org, and provide tools, templates, playbooks, and have the relationship with vendors.

We help BUs with strategies to impact the learners they want with routes to market. With customers we are 3X removed, so we don't interact with customers directly, unless through the Mook platform, which is direct training.

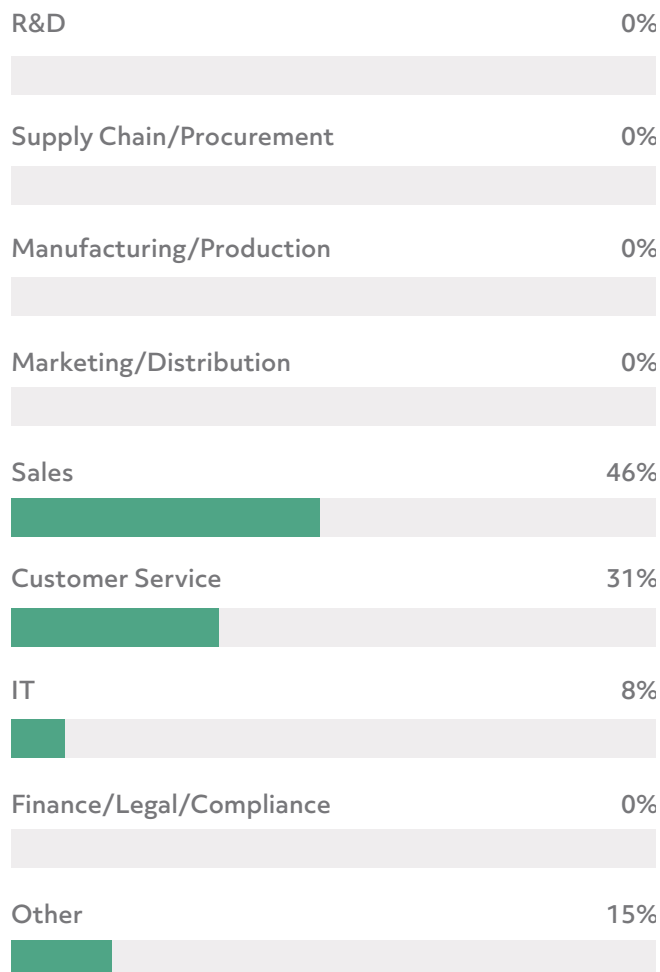
What are your hypotheses about opportune ways to harness data and analytical tools to help L&D improve business outcomes?

- "How could LDA help you shape a new learning journey or uncover new learning needs?"
- "What sources of operational data would you look to, to help you understand needs and "gaps?"
- "What would you anticipate learning, if you tap such data?"

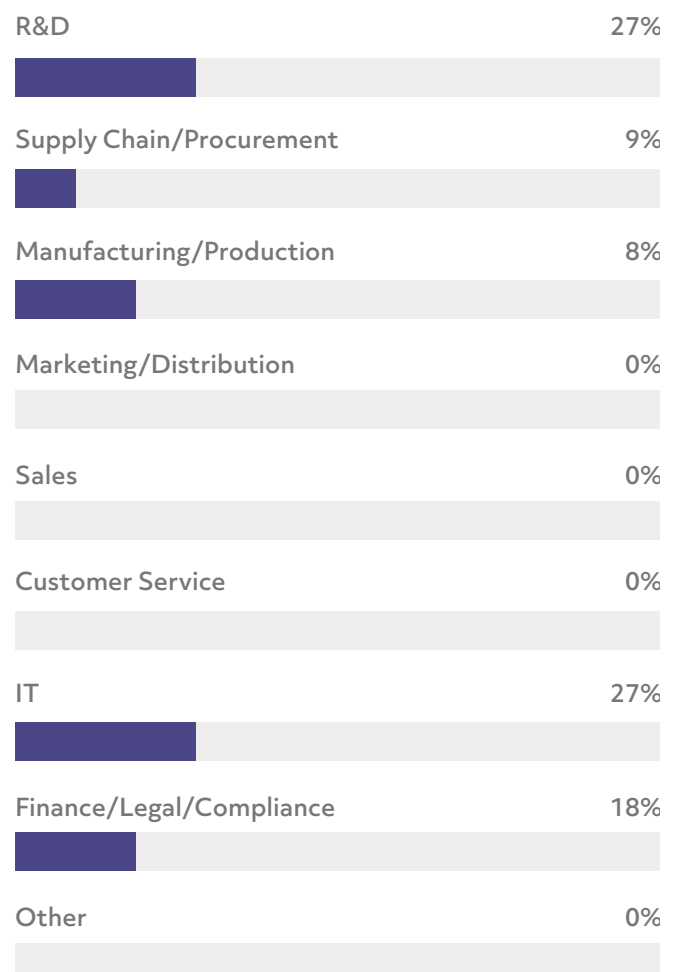
Comments:

- If we see no learning offerings in sales portfolio, that's an opportunity for a conversation. It becomes more meaningful if I can look at support tickets. Drive correlation between product sales PMRs and what exactly is in the portfolio.
- One example: We aligned deliverables for sales to Salesforce, embedded into salesperson workflow. The key was putting it in the contract. We put it in a contract beforehand with business goals, and were able to measure that impact in 6-9 months: significantly minimized email queries at substantial savings.

What areas of the business is the MOST likely starting point for your LDA efforts?



What area is the LEAST likely starting point for LDA in your business?



- Our most important VALUE ADD is to improve what we are doing ourselves. YES, I know this is a provocative statement, but we should improve what we have the most leverage over. We should focus on learning improvements, are we helping people learn? Are we helping them remember? Are we helping them to act in their work? THESE are things we have leverage over. We have less leverage over business results, so while we should be mindful of our ultimate goals, we should do better in creating feedback loops to improve our performance.
- There's an ethical side to this as well. Understand that you should let there be transparency to learning, actionable insights, and a safe place to learn. We need to have integrity when it comes to safeguarding learner data.
- Biggest mistake is building the wrong stuff. Having a portfolio that is not aligned with your business strategy or what your customer wants.
- Another one is assuming learning is the answer to every business question.
- I want to add this question of "data exhaust" and want to ensure there is some audience-driven learning. Be aware of the data exhaust you might see in participants.

