Four leaders on connecting L&D to what the business wants

Answers to the questions you asked during our webinar, plus poll results for the data lovers.

Q & A

What recommendations do you have for parsing out the contribution of a learning program when it's one of many inputs into the same business objective?

Only claim what you can support. Say the program contributed to the result, and don't say it caused it.

Business results move for lots of reasons. Pricing may have changed, or managers, systems or incentives. Something may have shifted in the market. Call out those factors when you report.

It helps to work backward from the result. Start with the behavior the learning was meant to change and check whether it changed. Then ask whether that behavior is reasonably connected to the business result.

> EXAMPLES FROM OUR PANELISTS
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> Three of our panelists have dealt with this in their own work.
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> Allyson's three-year leadership academy is a good example. In the session, she shared that the program had a 79% promotion rate and 86% retention of graduates. She was clear that she would never say the program caused those promotions. The participants were already high potentials, and promotion decisions also reflect performance, client relationships and the needs of the business. What she was comfortable saying was that the program contributed to their preparation.

> Brian's example from earlier in his career shows what happens when the business won't share the data. After his team trained a pharmaceutical sales force, sales of the product rose 9%, but the business wouldn't provide the numbers to confirm the link. His team reported that the increase came in the period after training and took some of the credit, but not all of it. His advice was to pick your moments carefully and never take full credit for a business result.
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> Valerie ran into this when the business credited her onboarding program for lower turnover. She pointed out that the business had also been weeding out bad leaders and getting standard operating procedures documented at the same time. As she put it, it takes the whole village.

How do we demonstrate L&D ROI when there's no way to directly correlate a learning intervention to a business outcome?

Sometimes you can't, and the word "prove" is often where the trouble starts. If you can't credibly isolate the effect of the learning, don't manufacture an ROI number just because it sounds more business-focused.

You can still ask whether people built the capability, whether their behavior changed, whether the relevant performance indicators moved, and what else might have contributed. Then ask whether that evidence is enough for the decision the business needs to make.

In the chat, Karen suggested treating L&D as an enabler of financial results rather than trying to put a dollar figure on training. Focus on the behaviors that drive the financial numbers, and measure those.

If the business genuinely needs an ROI figure, design the evaluation for that level of proof from the start. A dollar sign won't make weak evidence stronger.

How should we approach metrics for less tangible behavior changes such as psychological safety, especially if direct reports may not fully understand the term?

Before you measure a less tangible change, define what it looks like in practice. If you're measuring psychological safety, focus on what employees experience. Can they disagree with their leader, ask for help, admit a mistake or raise a concern? And what happens when they do?

Use a validated measure rather than writing your own questions that only sound like psychological safety.

> EXAMPLES FROM OUR PANELISTS
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> Valerie said pre- and post-surveys can help, but the more important evidence is whether safety shows up in the work. Are employees reporting issues more often? Are they asking for support when they need it? She gave the example of a retail store that was struggling but not asking for help. If that store started asking after a training like this, she would treat that as a sign the training had an impact. She was careful to call it correlation, not causation.

How should I think about measurement when I facilitate a session but there's little or no follow-up afterward?

Be upfront about that limit. If you run a one-off learning session and have no access to the team afterward, only claim what the session itself can show.

You can still learn a lot by the end of the session. Check whether participants recognize the behavior you're looking for and can tell an effective response from an ineffective one. Give them a realistic situation and see whether they make a good decision.

You can also ask about confidence or intention, as long as you call them what they are. Confidence tells you about confidence, and intention tells you about intention. Neither one proves behavior.

It's also worth asking why there's no follow-up in the first place. Skills like communication can still be measured by looking at what's happening around the people you trained. After a communication course for leaders, for example, you might look for fewer employee complaints or fewer write-ups.

What are some best practices for measuring whether a learning program led to the desired outcomes or behavior change?

Plan your measurement before you build the learning program. If you can't say clearly what someone should do differently because of the training, measuring behavior change later will be very hard.

Once you know the behavior, look for where evidence of it already shows up. It might be in the work itself or in a system. A manager might be able to see it, or it might appear in an operational measure. Don't automatically reach for a survey.

> EXAMPLES FROM OUR PANELISTS
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> Karen said the first thing she asks a leader is what change they're looking to drive. She follows up by asking what they want people to do differently the next day. Most leaders don't know the metric, but their answers to those two questions help her work out what it should be.
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> Allyson asks leaders what needs to be different as a result, and what success will look like a year from now if the program is done well. She tries not to prescribe a course until she understands what the leader is seeing in the business.
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> Karen also showed that the best metric sometimes turns up after the training. Her team asked the sales technology group what else they could report. That team found that activity records in Salesforce had more than doubled year on year, from about 600,000 entries to over a million, even though no one had asked the sales teams to log more.

Do you use other data, such as skills gaps, individual development plans or talent reviews, to inform decisions and discussions with stakeholders? And what dashboards do you use?

Yes. Skills assessments, development plans, talent reviews, and performance, engagement and customer data each tell you something different. It gets interesting when those sources agree, or when they don't.

If leaders say there's a major capability gap but the performance data doesn't show one, look into that before building any training. The cause could be a process problem, unclear expectations, or people who have the skill but aren't given the chance to use it. Sometimes the disagreement in the data is the finding.

Skills gaps can help you target training more precisely. Development plans can show who wants to build new skills or move into a new area.

> EXAMPLES FROM OUR PANELISTS
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> Karen explained that her team ran a self-assessment and is now moving to a more formal skills assessment, with the gaps feeding into training plans. For dashboards, her team uses a single view that shows managers and leaders how their groups are doing. It's mostly reaction and learning data today, with behavior measures now being added. It pulls from several sources, which is why she described the data team as another important partner for L&D.

What do you share with stakeholders while you wait for a program to mature and produce data over three years?

Don't wait three years to tell stakeholders whether you're seeing anything. The final business outcome may take that long, but you can report sooner on who you're reaching, what capability people are building, and how they're applying it. You may also see movement in KPIs that feed the long-term result.

At every stage, be very clear about what you can and can't measure yet. An early indicator shouldn't be presented as the final result.

> EXAMPLES FROM OUR PANELISTS
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> Allyson said she didn't struggle with this because the stakeholders also taught in the program, so they knew from the start that the data would take three years. In the meantime, her team filled the gap with stories from participants about how the program was affecting them and the business.

When you join a new company or team, how would you approach auditing existing programs for efficiency and training effectiveness?

Observe and ask questions before you change anything. It's tempting to assume you were hired to fix things and go in like a wrecking ball. That often destroys the parts that are working along with the parts that aren't.

For each program, start by asking why it exists and what problem it was built to solve. Check whether that problem still exists, who needs the program, what people should do differently because of it, and what evidence shows that's happening. After that, look at cost, usage, duplication, upkeep, and how the program fits with everything else employees are being asked to do.

Talk to the people others go to for help. Ask leaders, employees and any existing training team what they think is working and what isn't. You won't always agree with them, but you'll know where to tread carefully. Build your plan once you have that input, and not before.

Don't cut a program just because usage is low, or keep one just because satisfaction scores are high. Those measures answer different questions. A well-designed program that solves a problem you no longer have is still unnecessary.

POLL RESULTS

You train managers on giving feedback. Six months later, turnover on their teams has gone up. What happened?

When we asked what happened in this scenario, 83% of you said there's no way to tell from that number alone. The rest of the answers split like this:

8% said the training failed.

8% said it worked, but someone would still call it a failure.

2% said the training worked.

Valerie said all of these answers could be valid, depending on what else was happening in the business. Karen added that you can never fully isolate the variable. Sean noted that this is what happens when no one writes down and agrees on the expected outcome at the start.

Can you get the business data you would need to prove impact?

When we asked whether you can get the business data you'd need to prove impact, most of you said you have to ask for it each time:

59% said you can only get the data by asking someone every time.

14% said you have standing access.

14% said you tried and couldn't get it.

14% weren't sure who owns the data.

Sean pointed out that none of the panelists said their data came from the LMS. It sat with the business, HR, a sales technology team or a third party.

Who has actually blocked you from getting business data?

When we asked who has actually blocked you from getting business data, your answers were:

36% pointed to data governance, privacy or policy.

33% said nobody blocked you, you just didn't know who to ask.

18% said a stakeholder didn't want the data seen.

13% said a system owner or IT.

If privacy rules are your barrier, Karen described how her team has handled countries with strict privacy laws. They asked for aggregated data that still showed trends, and brought in a senior executive sponsor when they needed more. Valerie said she appreciated the honesty of those of you who didn't know who to ask. She would have been in the same position ten years ago.

What is the biggest thing standing between you and outcome-driven work?

When we asked what's standing between you and outcome-driven work, nearly half of you named the same obstacle:

49% said you can't get a business stakeholder to engage.

21% said you don't know which outcome to pick.

21% said you have too many incoming requests to work this way.

10% said you can't access the business data.

Allyson's advice was to stop leading with the learning initiative and focus on the business problem. Karen described how her team took a training it had run for about 15 years and presented it in terms of a problem the sales managers were facing. She said that changed the team's relationship with the business.

A FINAL THOUGHT

We opened the session with four questions every learning team should answer before it starts a project:

1. What outcome are we trying to achieve?
2. What data do we need to know whether we achieved it?
3. Who owns that data, and how will it be shared?
4. What have we agreed that proof of success looks like?

Measurement that doesn't lead to a decision is just reporting.

So here's one to finish for yourself: the fastest way to lose a business leader's attention is [...]

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