Learning & Development Best Practice

Industry research, practical tips and innovative ideas to help you improve and benchmark your learning and development strategy.

WORKPLACE IMPACT

LINE MANAGER ENGAGEMENT

INFORMAL LEARNING

TECHNOLOGY IN LEARNING

EVALUATION

MEASUREMENT

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Welcome

This report provides an overview of the key best practice methods within the learning and development community.

This research draws on telephone and face-to-face interviews with 40-50 training and HR professionals across a range of different industries.

While speaking with these professionals we have found that although they operate in different industries, the challenges they face are remarkably similar. All are facing the challenge of delivering more with fewer resources. All would like more engagement from either the senior management team or the line managers of their learners.

With this report, we intend to provide practical advice for L&D practitioners in improving the quality of their product, the engagement of their learners and the impact of learning in the workplace.

The advice we give is divided into the following areas:

Before — What happens before the learner starts their learning, whether in a classroom or online?

During — What goes on in the room or online?

After — What's the follow up and how do we know the training has made a difference?

We've often used "training", rather than "learning intervention" in the report to make it more readable. Many of the recommendations apply equally to one-on-one coaching, learning on the job and other methods. We hope it will prove useful.

Best regards

Gareth Batterbee
Kaplan Learning Methodology Lead

Before

The Headlines

- Analysis of training needs is increasingly informal

- Competency frameworks are often still struggling to show value

- Answering the "why" and "so what" of training is essential

- Informal learning needs to be part of the formal plan

- Getting line manager and executive engagement is critical for success

Origination of development need

The traditional set piece training needs analysis (TNA) has become much rarer across all types of businesses.

Development needs are more usually identified from one of three sources:

✓ The individual via the annual appraisal round

✓ The line manager

✓ HR/L&D through conversations with the business or analysis of the appraisal round data

There were instances of TNAs being carried out using focus groups and questionnaires, but these were isolated instances and typically reserved for milestone events (such as induction, new manager promotion etc).

The challenge arising, as one respondent noted, is that by the time the data from the appraisal process is collated and analysed and budgets signed off, the year can be three or four months in, leading to a development hiatus.

What can you do?

1	Talk to managers throughout the year	Development gaps don't just appear in the appraisal and you can get a heads up as to likely common themes BEFORE appraisal data is available
2	Manage expectations	If your people know that there will be a time lag between formal appraisal and formal development they will be more likely to look to their ongoing informal development
3	Have a selection of good quality gap fillers	Webinars, YouTube videos, TED.com and other FREE resources can be useful to point learners towards whilst you produce or commission something more substantial
4	Use programme alumni as a "hindsight TNA"	Ask six months later what they now know would have been useful on their induction/new manager programme and update it

Barriers to plugging teams' skills gaps*

Lack of time

Lack of suitable training sources

Budget

* Source: B2B Marketing's annual B2B Leaders report.

Linking to Competence and Value Frameworks

Most businesses we interviewed were still struggling to help staff understand the real value in competence frameworks. This was either because frameworks were newly implemented, had recently been redesigned, lacked sufficient detail, were not linked to salary or a combination of the four. In those businesses where the framework was established and demonstrated value, the articulation of development need was made much easier for managers and learners.

In businesses where competence frameworks were not working, they were regarded as an unhelpful distraction at best and a complete waste of time and effort at worst. In this situation it makes clear understanding of the development need and clear articulation of how learning will apply to the workplace even more vital.

Even if the competence or value frameworks aren't particularly detailed L&D departments can help increase their perceived relevance with the following steps:

✓ Include a slide at the start of a course with the business values or framework headings to provide context

✓ Where possible have learning outcomes for interventions using the exact wording of the framework

✓ Link learning outcomes to broad areas of the framework (e.g. "these objectives are key to achieving desired performance levels in the areas of customer service and team playing")

79% reported noticeable skills gaps in the teams they manage*

79%
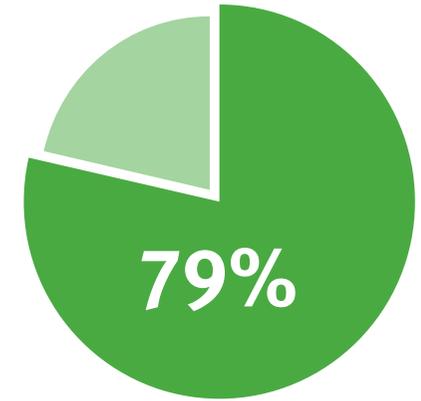
* Source: B2B Marketing's annual B2B Leaders report.

Identifying the outcome and "bottom line" impact

Clearly articulating the development need is something that comes naturally to most L&D professionals...but only because they have learnt how to do it. There was a consistent theme of frustration across many businesses that managers and individuals don't know what they really want and so just present a "training" problem to be "solved".

Be business partners: help your managers not only articulate needs but also recognise the needs in their staff and have an initial conversation to address issues. Offering them coaching in this area is a time and relationship investment which will pay future dividends.

Remember to word your L&D communication in language that regular line managers can understand.

70:20:10 Impact and Implications

Most of those interviewed were embracing the theory of 70:20:10 in relation to classroom and on the job learning. However, some were also finding that it can be a double-edged sword when talking to those controlling the purse strings. Using the theory to bolster line manager engagement and blending the classroom with the workplace can also weaken requests for more budget, particularly in the current economic climate.

70:20:10 plays well to self-directed learning. If it is to work then L&D teams need to make sure that when new joiners are inducted they are given guidance on what's out there to help them learn. Staff also need to understand that development won't just fall in their lap: they need to go and look for it in different places and recognise learning when it happens.

Digital Marketing Techniques

Main skills gaps*

Data

Customer Insight

* Source: B2B Marketing's annual B2B Leaders report.

Challenge questions for managers and course attendees:

✓ Have you discussed the behaviour/skills gap?

✓ What have you done to address it so far?

✓ Why didn't it work?

✓ What would you do if there was no L&D department?

✓ What specifically is going to change as a result?

✓ How are you going to use your new knowledge/skills to improve your performance and that of your team?

By rights this should lead to more directed development and clear link in the learner's mind to their role. However, in all the organisations interviewed the effectiveness is still heavily determined by the manager's engagement.

There's also the significant issue of identifying the best people to learn from on the job. While, in theory, the 70% should be learning best practice, too often the 70% includes elements of poor or worst practice, which then needs to be picked up and corrected through remedial development. This makes it even more critical that your managers both understand and can demonstrate best practices.
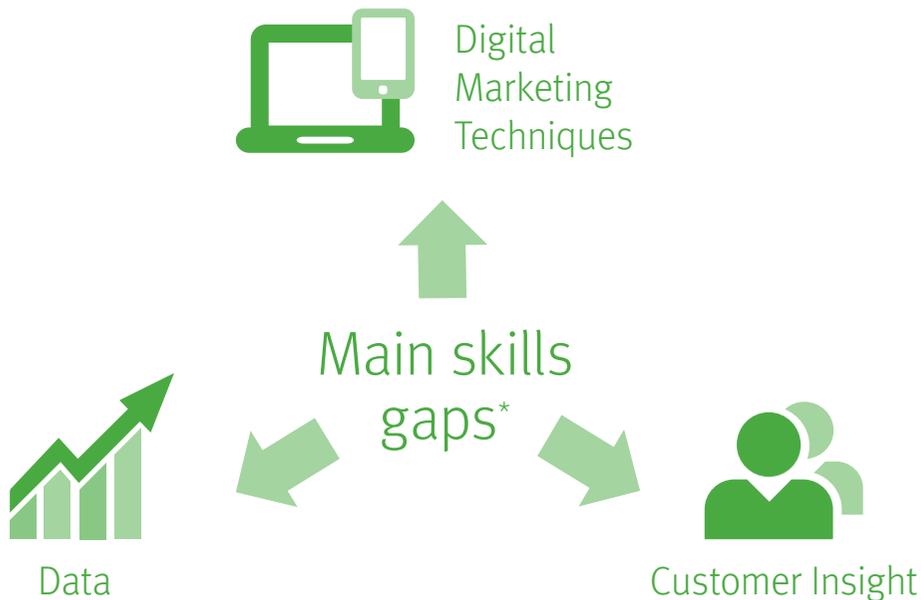
Line Manager Engagement

There has been a noticeable shift from the days of people development being regarded solely as the job of the L&D department to now being seen as integral to the role of the manager. This is clearly a welcome shift for most L&D teams, as it frees up their time to think more strategically and engage with the business at a higher level. However, this is not without its challenges.

Managers are in danger of being the "squeezed middle". They are caught between employees wanting to develop ("send me on a course") and the senior management ("we haven't got the budget, you need to develop your people yourself…now where are those sales figures?"). Those managers who enjoy the people development side of the role are thriving in this environment, but those who are more task focused are understandably struggling, as are their teams.

Managers are also asking for more by way of coaching, mentoring and feedback training in order to develop their people most effectively.

Executive Engagement

Those departments with the ear of the Executive reported the least challenge to budgets and the most frequent appearance of senior management as sponsors of programmes. Where there was no Executive engagement, without fail the L&D team were spending time chasing attendees and budgets.

How to help your Managers:

Pre-course briefings	Explain what the course will cover and what the learner needs to do beforehand (such as gathering feedback). These can be live or pre-recorded webinar format
Post course cheat sheets	One pagers covering the key models and terminology of your courses, including suggested development activities to be done by the learner back in their team
Manager rewards	Recognise your managers by offering them something in return, such as short coaching sessions, priority bookings on other programmes or simply endorsement of their people development skills for an appraisal

Gaining the ear of the Executive may take time, but there are some clear lessons:

Make the narrative	The most successful L&D managers not only ask the Executive what they want to know but also tell them what successes are happening
Pick your metrics	Number of attendees/drop out statistics, average course ratings, spend per head etc. Also supply anecdotal evidence of success
Share knowledge	L&D are in a unique place to have access to people across all the business silos and can often identify opportunities for the business to share knowledge and experience in a cost-effective manner

During

The Headlines

- Short = good

- Informal, self directed learning is increasing

- Traditional e-learning is still getting a mixed reception, often caused by negative association with compliance

- Helping the business understand the opportunity cost of cancellations is vital

- Getting the hygiene factors right is even more vital

Training Session Length

Whilst there are still some week long programmes (usually milestone events) the overwhelming move is to face-to-face sessions of one day maximum, and in some industries preferably half a day for client facing staff.

There are a number of reasons cited:

✓ Pressure not to be seen as doing non-client facing work

✓ Reduced headcounts leading to increasing work pressures

✓ Managers reluctant to leave the team short handed

✓ Budget cuts

✓ Reduced attention spans

With a shorter time being spent in the classroom there is increasing pressure to shift content into different delivery formats and for knowledge transfer to be done on the learner's own time.

Recommendations

✓ Shift knowledge input to short sessions (no more than 20 minutes) and tell learners how long it will take in advance. This allows for more focus in the session on application

✓ Place more emphasis on the benefits to managers: get specific about how their lives will be easier with better trained staff

✓ Get back to good learning basics with contextualised learning and a good variety of activities in the room to keep everyone engaged

✓ Involve clients in your training. For example, if you're running training in communication skills, get a client there with the team that serve them. The client sees value, the team spend time building the relationship in a different environment and development time is suddenly client facing

Informal learning

With less budget and fewer people in their teams, L&D functions are being driven to look to different styles of learning provision. The rise of informal, peer-to-peer learning is bringing opportunities as well as challenges.

Opportunities	Challenges
Faster reaction to learner needs	Quality assurance: is what they are sharing right?
Reduced need for L&D to drive content	Tracking best practice
Cross silo networking	L&D as stewards rather than creators of content
Involvement of more of the business in learning provision	Loss of control over the direction of learning in the business

As the in work learning environment evolves to mirror the out of work environment, the role of the L&D team is likely to become increasingly that of facilitator and learning explorer.

Recommendations

✓ Go out, spend time with the business and understand what they need in the moment

✓ Become a hub of contacts, able to connect silos and experts within and outside the business

✓ Make sure your Learning Management System (LMS) looks like a regular search engine so as to make it instinctive to use

✓ Challenge departments to cross-educate and share their knowledge

✓ Track the benefits, in financial terms if possible, of all collaboration

E-learning

Many L&D teams are still struggling to work out where and how e-learning best fits. We found no consistency in terms of which parts of a business preferred to use e-learning; it is very much down to individual choice.

Things to consider outside of personality include:

✓ Pressure of "presenteeism" where client facing staff are nervous about leaving their desks so prefer e-learning "in situ"

✓ Is e-learning seen as work? In many businesses staff are not given the uninterrupted time to do e-learning so prefer a course away from their desk

Some businesses were giving a firm "no" to formal e-learning: they thought it costly, complicated, compliance based and resented by users. Others felt that they should be doing more with e-learning, but where individual L&D managers had not had a positive personal experience with the format, they were not pushing an e-learning agenda. E-learning doubtless has a place, like everything else, but it is just another tool in the L&D team's box, rather than the "answer" it has previously been hailed as.

Some recommendations in the table below consider when to use e-learning and how to measure its use and/or success.

When

Global reach	Webinars (live and pre-recorded) as well as traditional e-learning are more cost effective than regional training to serve an audience in multiple locations and time zones
Compliance	Across a range of industries, from professional services through to hospitality, e-learning can be useful for generic compliance training (e.g. anti-money laundering, basic HSE)
Knowledge transfer	E-enabling the knowledge transfer elements of a programme allows more time for the practical application of the knowledge in the classroom (using e-books, webinars, Voice Over PowerPoint etc)

Key Considerations

Ease of use	Make sure that your e-learning is easy to find for your learners, easy to access once they find it (one log on screen) and easy to track (for usage stats/CPD records)
Make it short	Unless it plays like a computer game most users have an attention span of around 20-30 minutes maximum. Think media, not training.
Ignore your prejudices	If your people learn good stuff from it then don't worry even if it's not the way you would learn
Measure it like a regular course	Learning objectives and attendance rates (i.e. usage rates) should be assessed. Many businesses are paying for central e-learning suites but have no idea of the levels of uptake therefore can't report on cost per user
Ask for feedback	Just like any other element of the L&D offering, ask the users for what they thought and what can be done better, and then share this with the provider and the business

Historically, cost reduction was seen as the biggest driver for most businesses when considering e-learning. There looks to have been a marked shift from the time when e-learning was considered a great way to deliver cheap training. Instead the emphasis is now on reach, with the recognition that good quality e-learning is a considerable investment and therefore needs substantial justification, even in the area of compliance. Businesses are thinking more about the outcome than the vehicle that delivers it.

The Opportunity Cost of Training

Several businesses reported challenges in getting management to understand the impact if staff failed to turn up to training programmes, and also the wasted value if learning was not followed up back in the workplace. The issue was greater for programmes where L&D centrally held the budget: when function heads control costs, the impact of no shows is more apparent and therefore less likely.

Some recommendations to help with the issue:

- ✓ Operating an "airline booking" system for courses with frequent drop outs, so 14 places are allocated on a 12 place course to ensure it is full

- ✓ Cancellation charges for departments/managers who pull their staff at the last minute

- ✓ Naming and shaming the worst performing departments/ individuals in the monthly reports to the Executive

- ✓ Providing positive feedback to the Executive on those managers who support their teams' development

Hygiene factors: Materials, Learning Collateral and the Classroom Experience

While informal learning and technology based learning are rising, there is still a clear place for learning where individuals are all in one place specifically to learn (even if this is not in a traditional classroom). Recommendations for enhancing this experience are below. Many of these best practice elements will have been seen before, but still bear repeating for their proven impact on the learner experience.

✓ Phone/Blackberry/IT device amnesties for sessions

✓ Use of voting pads, Twitter/Facebook pages and tools like Wisembly to engage electronically during the session (with the obvious IT security caveats)

✓ Giving participants the option of hard or soft copy materials in advance of the session (to reduce the levels of unwanted workbooks being left in the training room)

✓ Smarter takeaways, such as credit card sized key points and coaching reminders, which are more practical than large files

✓ Enriching the learning environment with the usual array of training toys

After

The Headlines

- Evaluation remains mostly informal

- Follow up on learning is line manager dependent

- Many departments didn't have a concrete idea about how the business measured L&D's success

- There is no real pressure to measure ROI unless it's for large milestone programmes

Evaluation

Reaction ("happy") sheets are still the norm but most are very basic, only giving a simple score. A simple upgraded version can provide the L&D department with more information by simply doing the following.

> ✓ Ask learners to rate themselves before and after the session (ask for both at the end of the session)

This gives you information not only on whether the learners got value, but also on the relative shifts they experienced. It also allows you to see where an individual is at too high a base level for the session, which is normally lost in a simple "poor" rating overall.

For those who have moved to online feedback, response rates are typically between 30-50%. Ways of increasing the uptake include:

> ✓ Setting aside five minutes at the end of the course but within the timetable to complete
> ✓ Linking CPD certification to completion of feedback
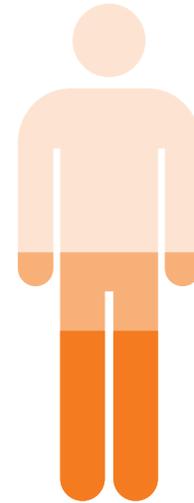
Online response rates are typically
30-50%

* Source: www.bcs.org

Whether online or paper, response rates dramatically improve when the trainer makes a personal request for the feedback to be completed in order to practice continuous improvement.

Many departments were not doing anything with the feedback sheets, perhaps due to the lack of helpful data, other than ensuring that the course passed a basic threshold of satisfaction. Reasons given for this lack of activity were split between a genuine lack of resource to process the feedback sheets and a lack of pressure from the business to formally evaluate the impact on the day (with the business being happy to deliver messages verbally or vote with their feet). Where the business does require more formal feedback, it doesn't need to be a time consuming chore.

- ✓ For manual feedback sheets, set up a standard template that allows for easy transfer of key scores and lets you produce a report

- ✓ Send this report to all key stakeholders: learners who attended, their line managers and the trainer/facilitator

- ✓ Send a summarised report of all training that month to the Executive
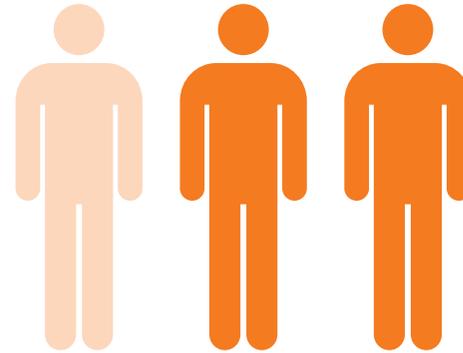
2 out of 3
believe they don't do enough CPD

Learners will see how they rated the course in comparison to their peers, a great way of benchmarking personal learning. Managers will get to see how the course was regarded and the trainer/facilitator gets to know what to improve, if anything, for next time.

Post training follow up was limited in most businesses to conversations with line managers/participants on an ad hoc basis. The exception was in the case of high-profile programmes (usually management and leadership content) where participants and line managers were interviewed three to six months post programme to find out the levels of behavioural change and impact back in the workplace.

Recommendations for follow up

1	Don't try and do it for everything	Pick key programmes to start with and build up
2	Know what you want and what you already have	Be clear from the start about your learning objectives and measure the base line performance before the intervention
3	Give something in return for feedback	Link the follow up with some additional learning input or a content refresh so learners see the value in attending

Learning back to the workplace

"Show and tell"	Participants report back to the team when they have been on externally run courses, sharing their new knowledge
One-on-ones	Meetings with line managers before and after the course to share development plans and find opportunities for applying learning
Faculty coaching	(Face to face or virtual) with faculty regarding application of content post course
Start a club	Online communities of course alumni set up to share ideas and further reading/debate
Projects	Learning sets putting their new skills to work on specific business impact projects
Notes to self	Participants write postcards or record video messages for their future self with actions to be taken. These are sent to the participant two to four weeks post course as a reminder and call to action.

The common key to successful transfer of learning back to the workplace across all of the businesses we spoke to was that the initial conversation between line manager and participant prior to attending the course a) had happened, and b) had identified SMART outcomes and objectives.

Measurement of the L&D Department

Most departments were unable to say how the business measured their success. As L&D professionals who challenge learners to produce SMART objectives for themselves, this is a strange situation and one that has potential dangers.

If L&D is rightly to be regarded as a specialism then departments need to work with key stakeholders to understand what their success looks like, how it can be measured and what value they bring to the business. If not then they run the risk of being seen as a peripheral department, which can result in outsourcing, as has happened with other support functions.

Key areas for L&D to be driving their importance in the next few years are likely to be:

✓ A talent development strategy for the online generation who are social media savvy but probably less well equipped with social skills or emotional intelligence

✓ Facilitating people connection across business units, and championing the improved financial results that this leads to

✓ Developing managers in their increasingly complex and uncertain roles

✓ Connecting with experts to quickly introduce the technical expertise the business needs but is missing internally

✓ Working as internal consultants to really understand the key behaviours required for success in each area of the business

As ever, the best departments are doing some or all of these activities already but there was significant scope for all departments to make more noise about their successes.

Return on Investment (ROI)

The elusive Kirkpatrick Level 4 and links to ROI dominates much of the online discussion on L&D but in the vast majority of businesses we spoke to, there was no pressure from senior management to put a financial measure on the success of training. Approaches ranged from the "head in the sand/don't ask don't tell" to the robust rebuttal of the model as an impractical waste of time and resource. Respondents cited the real proof was in such metrics as "net recommender" and anecdotes from line managers of improved performance.

The biggest single challenge in measuring impact and return appears to be a lack of hard data from BEFORE programmes are launched. If senior management are putting pressure on to measure ROI then L&D teams must push to establish the key criteria by which they will be measured. Only then can training be designed that can hope to have a positive impact.

Putting arbitrary financial figures on training effectiveness is not recommended. Some useful measures to monitor before and after include:

- ✓ Time to complete activities (appraisals, budgets, work based tasks)

- ✓ Adherence to key deadlines

- ✓ Retention rates/sickness rates (amongst learners and their teams in the case of management training)

- ✓ Employee satisfaction surveys etc.

If you are looking to bolster anecdotes with statistics we would recommend the following steps:

- ✓ Decide what your programme objective is and make it SMART

- ✓ Measure your KPIs before rolling out the programme

- ✓ Measure the same KPIs after the programme, preferably with control groups who have not had the same training to determine if improvements can be attributed

The size of many teams will not permit the control group, but more can be done to measure performance before. The likelihood is that many businesses will have this data, the key is asking the smart questions to extract it.

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