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OCT 24–25, 2022

SESSION: BEYOND LEVEL 2: DESIGNING MEANINGFUL LEARNING PROGRAMS WITH EVALUATION IN MIND

SPEAKER: Kristopher Newbauer

Interactive Polling

This session includes interactive audience poll questions using Slido.

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Session Description

This session links the “Analysis” and “Evaluation” pieces of the ADDIE framework to better inform Design, Development, and Implementation. While evaluation is the emphasis of this session, the focus is on designing stronger learning programs that are directly linked to addressing business issues and that have demonstrable results beyond Level 2.

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Session Objectives

Upon successful completion of this session, learners will be able to design impactful learning with evaluation in mind. During this session, learners will:

- Identify business problem/challenge using the language of business
- Translate business problem/challenge into a course goal
- Determine course success evaluation criteria using 4 levels

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What Are YOU Responsible For?

1. Analysis
2. Instructional Design/Curriculum
3. Facilitation/Delivery
4. Evaluation

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8 STEPS FOR DESIGNING IMPACTFUL LEARNING WITH EVALUATION IN MIND

8 Steps for Designing Impactful Learning Programs with Evaluation in Mind

1. Identify the business problem/challenge
2. Translate the business problem/challenge into a business goal
3. Determine if training is a solution; if so, determine %
4. Determine what successful training “looks” like
5. Determine what knowledge is needed to achieve the goal
6. Determine what skills are needed to achieve the goal
7. Use knowledge and skills to inform course objectives
8. For each course objective, design and develop learning activities

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AUDIENCE POLL

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ADDIE

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ADDIE

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1. Identify the business problem/challenge

1. Declining sales
2. Increasing waste/costs
3. Increasing employee turnover
4. Desire to grow membership and revenue
5. Etc.

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1. Identify the business problem/challenge

What is YOUR business problem/challenge?

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1. Identify the business problem/challenge
Use the Language of Business → MONEY

Declining sales: US sales have declined year-over-year by USD$2MM

Increasing waste/costs: The cost of processing each transition has doubled from USD$8/transaction to USD$16/transaction due to delays and errors

High turnover: Staff turnover has increased from 20% to 45% (100 employees per year to 250 employees per year), increasing replacement and onboarding costs by USD$6.375MM

Desire to grow membership and revenue: Membership is currently at 1.2MM and dues revenues are at USD$73.3MM.

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1. Identify the business problem/challenge
Use the Language of Business → MONEY

Reframe YOUR business problem/challenge using the language of business

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2. Translate the business problem/challenge into a business goal

- Declining sales: US sales have declined year-over-year by USD$2MM
  - Increase US sales by USD2.5MM in twelve months by 31 December 2023
- Increasing waste/costs: The cost of processing each transition has doubled from USD$8/transaction to USD$16/transaction due to delays and errors
  - Reduce processing costs by 50% to USD$8/transaction by 30 June 2023
- High turnover: Staff turnover has increased from 20% to 45% (100 employees per year to 250 employees per year), increasing replacement and onboarding costs by USD$6.375MM
  - Reduce turnover to less than 20% and replacement/onboarding costs by USD$6MM by 31 December 2023
- Desire to grow membership and revenue: Membership is currently at 1.2MM and dues revenues are at USD$73.3MM.
  - Increase membership to 1.4MM members worldwide and increase dues revenues (through membership growth) by USD$12MM to USD$85.47MM by 1 July 2023

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2. Translate the business problem/challenge into a business goal

- Reframe YOUR business problem/challenge into a goal using the language of business

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3. Determine if training is a solution; if so, determine %

- **ASK:** How much of this goal could be achieved by improving (or introducing new):
  - Knowledge
  - Skills
  - Attitudes

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AUDIENCE POLL

Active poll

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Which level(s) of evaluation do you use in your organization? Select as many that apply.

Level 2 - Learning
93%

Level 1 - Reaction
89%

Level 3 - Behavior
36%

Level 4 - Results
25%

Level 5 - ROI

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3. Determine if training is a solution; if so, determine %

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3. Determine if training is a solution; if so, determine %

- **ASK:** How much of this goal could be achieved by improving (or introducing new):
  - Knowledge [cognitive domain: **KNOW**]
  - Skills [psychomotor domain: **DO**]
  - Attitudes [affective domain: **THINK/FEEL**]

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3. Determine if training is a solution; if so, determine %

- **ASK:** How much of this goal could be achieved by improving (or introducing new):
  - Knowledge [cognitive domain: **KNOW**]
    - Product features & benefits
  - Skills [psychomotor domain: **DO**]
    - Active listening skills
    - Gaining commitment/Closing the deal
    - Negotiation skills
  - Attitudes [affective domain: **THINK/FEEL**]

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3. Determine if training is a solution; if so, determine %

- **Business Problem:** US sales have declined year-over-year by USD$2MM
- **Business Goal:** Increase US sales by USD2.5MM in twelve months by 31 December 2020
- **Training as a solution:**
  - What are possible strategies for accomplishing this business goal?

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3. Determine if training is a solution; if so, determine %

- **Business Problem:** US sales have declined year-over-year by USD$2MM
- **Business Goal:** Increase US sales by USD2.5MM in twelve months by 31 December 2020
- **Training as % of solution:**
  - New products: 30%
  - Pricing adjustments: 5%
  - Marketing initiatives: 15%
  - Increase sales force: 25%
  - Incentive pay program: 10%
  - Sales training: 15%

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3. Determine if training is a solution; if so, determine %

- What are the possible strategies to accomplishing YOUR business goal?
- What percentage do you think training can contribute to achieving the business goal?

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4. Determine what successful training “looks” like

AE_CDDIE_E

- E_C: Evaluation *Criteria*
- E_E: Evaluation *Execution*

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4. Determine what successful training “looks” like

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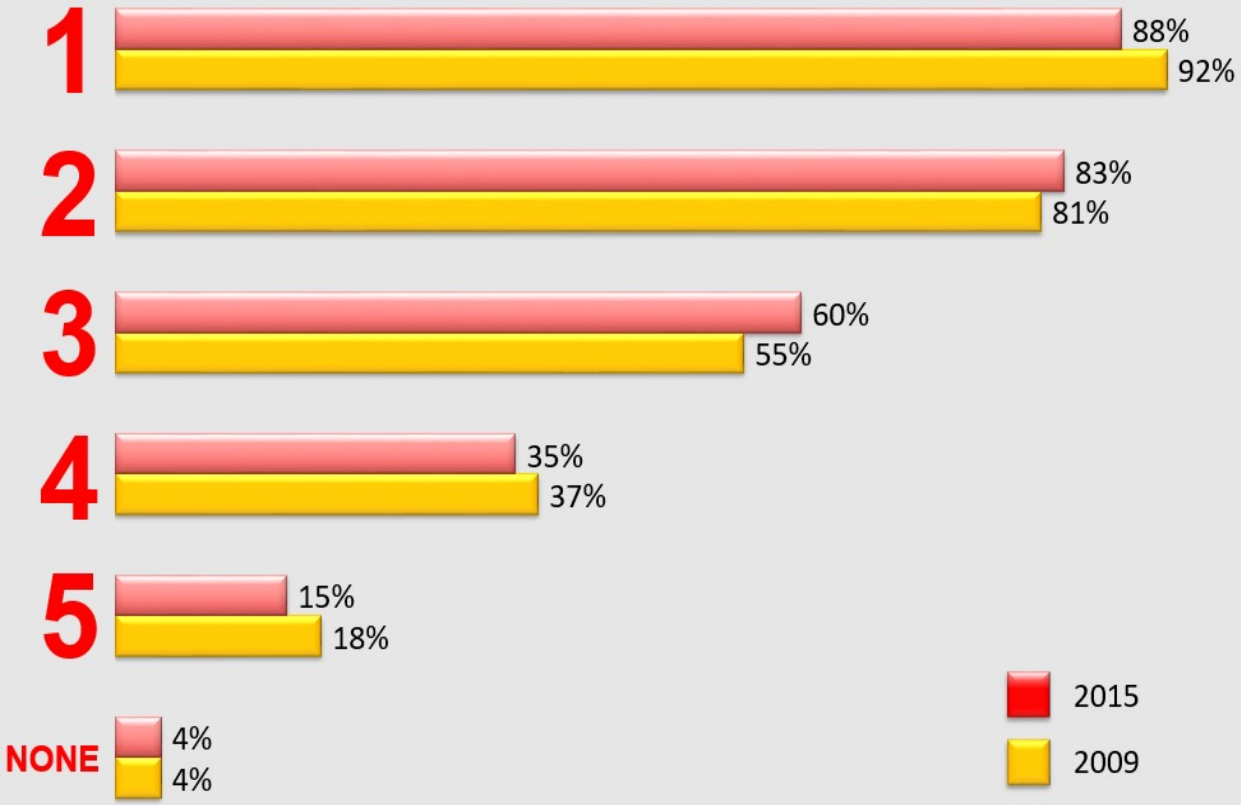
Preview

USE OF 5 LEVELS OF EVALUATION



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4. Determine what successful training “looks” like

1-REACTION	2-LEARNING	3-BEHAVIOR	4-RESULTS
85% of learners indicate that the instructor meaningfully contributed to their experience	98% of learners successfully complete mock sales pitch exercise	Sales managers attest that 95% of learners are using actives sales skills learned during the training with their customers	US sales increase by USD$2.5MM by 31 December 2020 (15%)
Net Promoter Score (NPS) of at least +75	95% of learners pass product features and benefits demonstration	95% of leaners attest that they are applying what they learned in the course when interacting with customers	Year-over-year US sales increase by 5% between 31 December 2020 and 31 December 2021
100% of learners intend to apply what they learned back on the job in the next 90 days	100% of learners pass the post-course assessment with a score of 90% or higher	80% of surveyed customers indicate that they witnessed behaviors during their interaction w/learners	90% of Executive Leadership Team attributes 15% achievement of business goal to training

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What will **YOUR** Training Success Look Like?

1-REACTION	2-LEARNING	3-BEHAVIOR	4-RESULTS

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5. Determine what knowledge is needed to achieve the goal

BUSINESS PROBLEM	U.S. sales have declined year-over-year by USD$2MM	
BUSINESS GOAL	Increase U.S. sales by USD2.5MM in twelve months by 31 December 2020	
TRAINING AS % OF SOLUTION	15%	COURSE OBJECTIVES
KNOWLEDGE	Product features & benefits	• Learners will be able to effectively demonstrate product features • Learners will be able to effectively communicate product benefits
SKILLS	Actively listening	• Learners will be able to effectively demonstrate active listening
	Gaining a commitment/ Closing the deal	• Learners will be able to…
	Negotiation skills	• Learners will be able to…

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6. Determine what skills are needed to achieve the goal

BUSINESS PROBLEM	U.S. sales have declined year-over-year by USD$2MM	
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7. Use knowledge and skills to inform course objectives

BUSINESS PROBLEM	U.S. sales have declined year-over-year by USD$2MM
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TRAINING AS % OF SOLUTION	15%
KNOWLEDGE	Product features & benefits
SKILLS	Actively listening
	Gaining a commitment/ Closing the deal
	Negotiation skills

COURSE OBJECTIVES
• Learners will be able to effectively demonstrate product features
• Learners will be able to effectively communicate product benefits
• Learners will be able to effectively demonstrate active listening
• Learners will be able to…
• Learners will be able to

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8. For each course objective, design and develop learning activities

COURSE OBJECTIVES	LEARNING ACTIVITIES
• Learners will be able to effectively demonstrate product features	• Mock sales pitch using product features • Product features knowledge test
• Learners will be able to effectively communicate product benefits	• Mock sales pitch using product benefits • Product features knowledge test
• Learners will be able to effectively demonstrate active listening	• Active listening scenario learner triads (customer/salesperson/observer)
• Learners will be able to…	• …
• Learners will be able to…	• …

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8 Steps for Designing Impactful Learning Programs with Evaluation in Mind

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Session Objectives

Upon successful completion of this session, learners will be able to design impactful learning with evaluation in mind. During this session, learners will:

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QUESTIONS?

THANK YOU!

Kristopher.Newbauer@rotary.org

FEEDBACK COUNTS

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