Measuring & Reporting Learning Path Results

learning paths international

Defining Proficiency

The overall goal of a Learning Path initiative is to dramatically reduce time to proficiency. This means that assessing and tracking proficiency is the cornerstone of our measurement strategy. We define proficiency as the measureable outputs and observable actions of an employee performing as the required level and in the required manner.

Our assessment tool is a Proficiency Definition. A Proficiency Definition consists of 20 to 50 Proficiency Statements that describe performance in terms of quantity, quality and time. The following are examples of Proficiency Statements for a sales position:

- Generates and maintains a list of 50 qualified prospects per month
- Sets a minimum of 4 appointments per week with qualified prospects
- Submits a minimum of 5 proposals each month at a minimum of $75,000 each

Each of these statements can be measured through sales reports and review of prospect lists, appointment calendars and proposals. Other statements that relate to actions on the job, can be measured by direct expert observation such as by a sales manager on a joint call with a salesperson. These types of statements might include:

- Builds credibility and demonstrates expertise by answering product and technical questions in a clear, concise and fluent manner
- Gains agreement on customer's needs and issues through effective questioning, listening and recapping

Milestones

While our goal is to reduce total time to proficiency, we can also measure and track progress along the way. Employees don't reach all the Proficiency Statements at the same time on the last day. In reality, proficiency builds over time and certain statements are mastered earlier than others. This allows us to establish a proficiency milestone for each Proficiency Statement. For example:

Statement	Milestone
Gains agreement on customer's needs and Issues through effective questioning, listening and recapping	Month 3
Submits a minimum of 5 proposals each month at a minimum of $75,000 each	Month 8

The following is an example of part of a Sales Proficiency Definition which we will use to show how to measure and report proficiency and time to proficiency .

"A Proficiency Definition is the cornerstone of measuring results."

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Category: New Business

Done	Proficiency Statement	Milestone	Verification
	1. Generates and maintains a list of 50 qualified prospects per month	2 months	Review prospect list in system at monthly review
	2. Sets a minimum of 4 appointments per week with qualified prospects	2 Months	Review monthly sales report
	3. Submits a minimum of 5 proposals each month at a minimum of $75,000 each	3 Months	Review monthly sales report
	4. Closes at least 1 proposal each month of a least $75,000 with a 20% profitability	5 Months	Review monthly sales reports

Category: Managing Accounts

Done	Proficiency Statement	Milestone	Verification
	5. Develops and maintains an active client base of at least 25 accounts with sales of $75,000 or more	8 months	Review quarterly sales reports
	6. Sells a minimum of $250,000 in each product line per quarter	8 Months	Review quarterly sales reports
	7. Identifies and resolves customer issues and complaints within 24 hours by involving the correct internal resources	6 Months	Review monthly service reports and customer surveys
	8. Builds and maintains a productive working relationship with at least 3 key contacts within each customer organization	6 Months	Review client list and observe on joint calls
	9. Attains a 90% retention rate of current clients with a customer satisfaction rating of 95% or higher	12 Months	Review quarterly sales reports and customer satisfaction scores.

Note. that there is a column marked done. This can be used to track completion by entering the date the salesperson reached that level of proficiency.

Assessments

We have planned assessments all along the Learning Path. This assessments are part of a weekly or monthly review meeting. At that meeting, we are looking at completion of Learning Path activities as well as assessing whether the employee has meet the requirements of a Proficiency Statement at the designated milestone. The following is a calendar view of the first month of a Sales Learning Path which extends of 12 months. Note the weekly reviews.

Month 1

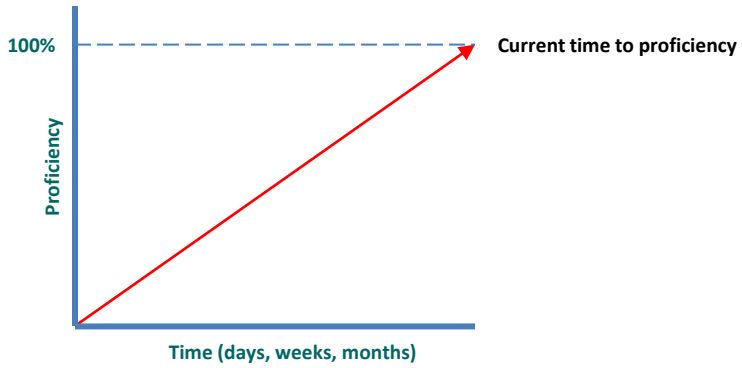
1	2	3	4	5
1. Welcome and Overview 2. Human Resources 3. Learning Path Start-Up	4. Company Overview 5. Office Set-Up 6. Product Overview	7. Sales Process Overview 8. Customer Visits	(Continued Customer Visits)	**9. Week 1 Review**
8	9	10	11	12
10. Oxbow Product Training Module 1 11. Oxbow Plant Tour and Job Shadow	(Continued Job Shadow)	12. Oxbow Marketing 13. Developing a Prospect List 14. Building a Prospect List in the System	(Prospect List Continued) 15. Customer Service Job Shadow 1	(Job Shadow Continued) **16. Week 2 Review**
15	16	17	18	19
17. Oxbow Product Training Module 2 (Type 1) 18. Wingster Product Training Module 1 (Type 1)	19. Prospecting Call Type 1	(Prospect Call Continued)	20. Building an Initial Presentation Type 1	21. Wingster Plant Tour and Job Shadow **22. Week 3 Review**
22	23	24	25	26
23. Wingster Marketing 24. Initial Presentation Observation	(Continued Initial Presentation)	(Continued Initial Presentation)	25. Sales Reporting 1	26. Wingster Product Training Module 2 (Type 1) **27. Week 4 Review**

Time to Proficiency

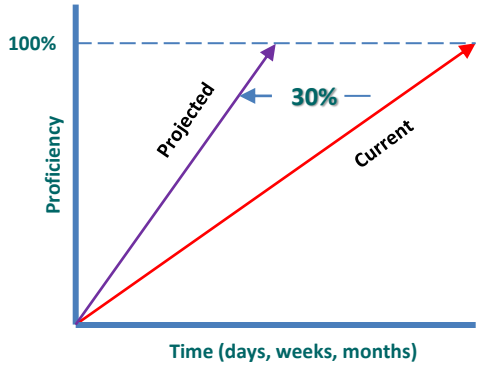
So far we've described how we look at and measure proficiency. To measure time to proficiency, we need to first establish a current baseline. When there is actual performance data available we can look at when employees considered proficient reached that level of proficiency. For example, with salespeople we can look at past sales reports.

However, in most organizations at the start of a Learning Path initiative there is usually limited or incomplete data. Since we are putting in a measurement system, going forward this data will be there and it can be used to track ongoing improvements.

Often the first time the measurement is done, we need to rely on a survey method for establishing current time to proficiency. To do this we identify all key stakeholders as well as incumbents in the job and their supervisors. When then conduct a survey that asks them how long it takes for new employees to produce the results and achieve the Proficiency Definition. This can be charted as shown below.

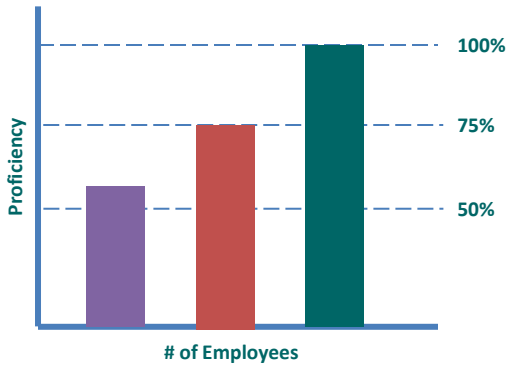


At the point a new Learning Path is developed, a projected time to proficiency can be calculated. It should be a minimum of 30% faster. This is shown in the chart below.

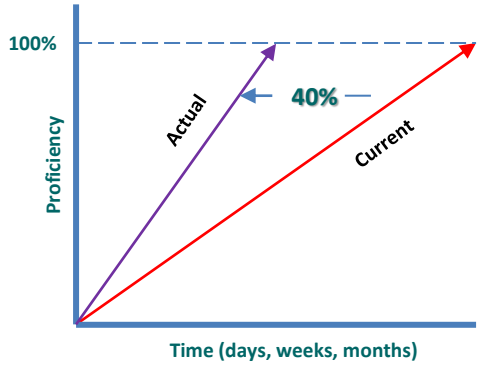


"Every minute an employee is less that fully proficient has a direct impact on the bottom line."

When a Proficiency Definition is established, it becomes obvious that there are proficiency gaps in the current workforce. This can be charted as shown below.

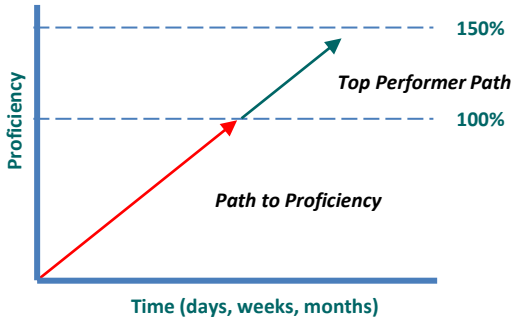


Therefore, an important part of measuring the results of a Learning Path is to measure the effects of closing this proficiency gap with incumbent employees. Once the Learning Path has been launched and employees have reached proficiency, the chart looks as shown below.



Top Performers

An initial Learning Path targets proficiency as the required levels of performance for a new employee to be fully up-to-speed and independently productive. It is not designed to go from day one to high performance. However, moving proficient employees to high performers is important. We like to look at this as second Learning Path that extends from proficiency. It looks like the chart below.



"Extend the Learning Path to reach high performance."

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Tracking Results

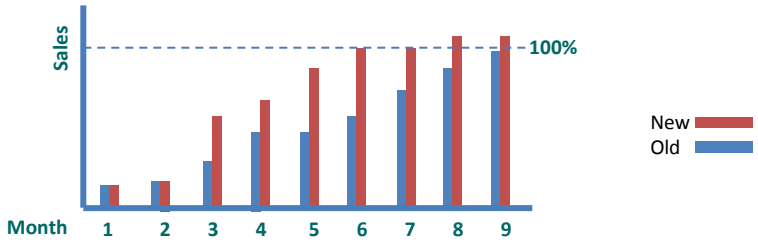
Now the challenge is to track the results of both reducing time to proficiency and increasing levels of proficiency within the incumbent workforce. Each job will have logical places to look for results. For example in sales, you would look at:

- New business sales
- Customer satisfaction
- Repeat business
- Returns
- Gross margins and profitability

In a manufacturing job, you would like at:

- Production rates
- Error or scrap rates
- Accidents
- Product quality

Let's take a simple measure such as sales volume. Here's what it would look like for a new salesperson charting changes in sales per month.



You could also look at total sales during the path to proficiency.

There are also other direct effects of a Learning Path that can be measured. This include:

- Cost of trainer or supervisor time
- Cost of retraining
- Turnover costs
- Exposure to risk or accident

Therefore at the start of a Learning Path Initiative, you can set up the a method to track and assess the results of the Learning Path. Usually Proficiency Definitions are in alignment with Key Performance Indicators of the organization so this measurement system may already be in place.

Reporting Results

The most direct way to report results is through submitted the results of the weekly meetings to the Learning Path owner. This report includes both progress along the Learning Path and completion of key proficiency milestones. This can be done through a simple online submission form as shown on the following page.

"Getting to proficiency faster means faster results for the organization."

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Week 8 Review

Check Off Completed Activities from week 7

- ❑ Sales Training Part II
- ❑ Proposal Presentation Type 1 Account Practice and Evaluation
- ❑ Wingster Marketing Training
- ❑ Wingster Plant Job Shadow

Check off Proficiency Milestones to be completed by week 8

- ❑ Generates and maintains a list of 50 qualified prospects per month
- ❑ Sets a minimum of 4 appointments per week with qualified prospects

Comments:

Submit

This information can then be combined into a report that summarizes the progress of everyone on the Learning Path.

Summary

The key to measuring and report the results of a Learning Path is to focus on measuring proficiency and time to proficiency. Using a Proficiency Definition as the assessment strategy builds into a Learning Path a way to track and report progress.

Since the Proficiency Definition incorporates the measure the organization uses and finds valuable it enables tracking results from the Learning Path and connecting them to financial benefits.

"Report the results of weekly meetings."

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