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How training can add real value to the business: part 1

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Keywords

Training, Action learning, Effectiveness

Abstract

This is the first of two ground-breaking articles set to challenge the training community with a call to action written by Dr Richard Hale, a leading proponent of action learning. Here he argues that the time has come to shatter the myths that have emerged based upon the propositions of Donald Kirkpatrick some 43 years ago. Learning should be seen as the responsibility of the learner not the trainer. Proving learning should be integral to the process of learning not based on before and after statistics. This is based on Richard Hale's own learning from action with international organisations through the International Management Centres Association.

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Evaluation in practice

It is over 43 years since Donald Kirkpatrick published a model for the evaluation of training suggesting it should take place at four levels. These levels were:

- (1) *Reactions*. Are people happy with the training inputs?
- (2) *Learning*. What do people remember from the training sessions?
- (3) *Behaviour*. Do people use what they know at work?
- (4) *Work results*. What are the outcomes of applications on the job over a period of time?

Since the publication of the original model we have witnessed dramatic change in organisational structures, cultures, technologies and training methods. Yet the HR, training and development community continues to rely predominantly on the old Kirkpatrick model in discussing the evaluation of training.

It has however proven an unworkable model in practice. In a USA based survey only 7 per cent of organisations surveyed evaluated the return on investment in training. In the UK 57 per cent of organisations recently surveyed said evaluation was becoming more important, but only 27 per cent are using action plans after training and just 16 per cent use follow up from training and development.

The time has come to reformulate how we view evaluation of training and in this the first of two articles I would like to expose some of the myths around training and present some new approaches to assessing effectiveness. This has evolved from recent experience with new models of training design applied in major international organisations. These cases show the benefits of placing the responsibility for evaluation firmly on the shoulders of the learners. Also we can see that true learning is inextricable from action and the work environment.

Research by the ASTD has provided the results shown in Table I of how companies actually approach evaluation of training at each of the levels suggested by Kirkpatrick.

Kirkpatrick (1996) in a more recent summary of his original work, proclaimed that evaluation should be used to help training directors sell more training. He says:

The future of training directors and programs depends to a large extent on their effectiveness. To determine effectiveness attempts should be



Table 1 Percentage of companies that use each level of post-training evaluation

	Per cent
Level 1 (reaction)	78
Level 2 (testing for learning)	32
Level 3 (behaviour change)	9
Level 4 (ROI)	7

Source: American Society for Training and Development (2002)

made to measure training in scientific and statistical terms (Kirkpatrick, 1996).

And herein lie a number of assumptions and myths that have emerged due to reliance on the Kirkpatrick model.

Myth no. 1 – Learning is the responsibility of the trainer

First that training evaluation should serve to protect the role of the training professional. Many HR and training professionals have indeed worked to this protectionist model, with the prime purpose of their evaluation efforts being to justify their position. Line managers and recipients of training have been happy to go along with this. After all it takes the heat off the learner or business manager if he or she can throw the onus for evaluation back onto the trainer, the HR function or the consultant delivering the training. If they cannot prove the value of the training, and invariably they cannot, then it is down to the provider to “try harder”, not the learner.

Such thinking works against the espoused principles of ensuring learners take responsibility for their own learning. If you are to take responsibility for your own learning that should not only include contributing to the identification of your needs and possible solutions, but the evaluation of training inputs and learning outputs.

Myth no. 2 – Courses prove learning

Kirkpatrick’s statement above implies that scientific and statistical measurement is the best way of proving effectiveness of training. Well maybe if measuring in an environment where variables can be controlled and where it is possible to isolate cause and effect. He suggests we should use control groups where possible to be able to prove the value of training. Control groups are fine in laboratory conditions but less practicable in most organisational and particularly management

level training which aims to have an impact on job performance. If you try to set up a control group there are just too many real life variables to control in order to achieve a valid measure. In the real world of the organisation, real life gets in the way of such assessment.

Sure, individuals should be encouraged to present the evidence of their learning. If they can identify realistic before and after measures and if a financial case can be made for a return on investment then that is important. However in the quest for presenting a financial case, all too often qualitative issues are subjected to fabricated and meaningless quantitative formulae.

The centralist quest for standardisation and statistical measurement usually ends up as a measurement of inputs rather than outputs. Reports are prepared which show, for example, the number of training days delivered, the number of hours spent in the classroom, or the number of courses run. These measures are more defensive and retrospective than strategic; they are designed to show the training department has been doing its job and knows how the budget has been spent. They bear no relationship to the measurement of learning or business outcomes.

Myth no. 3 – Good course evaluations mean learning

The reactions level (Kirkpatrick level 1) is usually tackled through end of course evaluation questionnaires, and because it is easy to do – 78 per cent of organisations are evaluating in this way. However this is usually little more than a litmus test for happiness at the time of answering the questions. Happiness does not necessarily mean learning. Often the most powerful learning experiences that people report, come from difficult and painful experiences, such as being thrown in at the deep end with a new job or having to adapt to a new industry.

Post-course evaluation questionnaires may assess the level of happiness of a participant but this must not be confused with evidence of learning. If trainers are aware that they may be judged on the post-course evaluation scores, they soon learn to use applied psychology in ensuring that participants are in a state of pleasure before completing their evaluation forms!

How do we move beyond the myths – start with action and performance

If these are some of the myths that have developed concerning organisational training, then what should we do about it? Maybe to perpetuate the myth is less controversial and problematic than to challenge it. I have spoken to many training and HR managers who have shown me with pride the suite of training courses that they manage. Yet they often will agree that there is no evidence of a return on investment and that because the courses are isolated off-job events there is little likelihood of the training having a sustained impact when the participants return to their jobs. They recognise the paradox, but do nothing about it. Furthermore the same training managers will bemoan the fact that the business leaders do not value training and development and the same HR managers will complain that they are not taken seriously at board level. Many say they would like to innovate but then ask “Who else is doing it?”.

So here are some suggestions for a new *modus operandi* and a reformulation of the way we should look at evaluation.

Learning is the responsibility of the participant

Many HR and training staff talk about the need to encourage members of their organisation to take responsibility for their learning, and there are an increasing number of systems to support this, often linked in with performance management and personal development plans. Introducing documentation and a centrally driven system, however, does not change behaviour and attitudes. The motivation to take responsibility for your own learning will come from experience, encouragement and most of all from within.

Rather than focus on the roll out of PDPs we should start with real business issues, establish work groups which are also learning groups. Participants should be asked to define their personal learning objectives from the start, to review learning at regular intervals and at the end of work based projects. Learning comes from action and learning is a social process. I have been involved with supporting such projects in commercial organisations and in public services. The responsibility for learning can shift psychologically and literally from the training

department to the participant. In order to achieve this you need to establish expectations and ground-rules from the start and then provide supportive and assertive facilitation throughout a defined project and period of action and learning. Strong facilitation and work groups can create a constructive form of peer pressure and a learning culture.

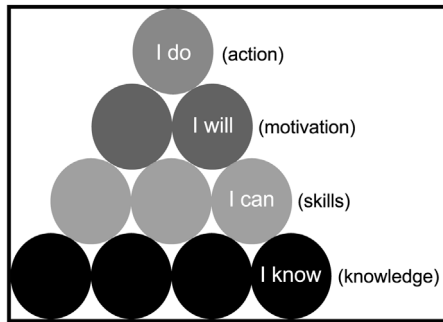
One participant from a major drinks business where I was involved in such projects and programmes described it like this: “I have been through a taught MBA programme and a number of company courses, but this process has provided the most powerful learning experience so far”. This person had been through a programme that combined taught inputs and skills development with learning set “trios” where members supported each other in exploring action plans and learning. One year after the formal programme had finished I met this person who was delighted to tell me that the “trio” was still meeting and had moved to another level of understanding and learning insight. In fact he was worried that there were moves from the training department to change the membership of the trio and felt this would be destructive.

When working with extended periods of action and learning in this way, at the end of a defined period, say 100 days, participants should present the value added case to key stakeholders. Colleagues and the organisation’s leaders should hear about both the actions they have taken and the learning that has occurred. The emphasis should be on what has been done rather than making recommendations for approval.

Proving learning is integral to the process of learning

Opportunities should be provided for participants to write up a summary of their learning and for this to be held as a record of and in recognition of their added value contribution to the business. The sum of all such records will outweigh any attempt centrally to evaluate a training programme with a phoney post-course evaluation formula. The training and development team members will establish higher credibility as the facilitators of business related learning rather than being seen as administrators and systems police.

Learning takes place at various levels as shown in the Value Projects Model of Learning (see Figure 1). In working with real

Figure 1 Values Projects Model of Learning

Source: Value Projects Ltd (2002)

work projects as a basis for learning, this model has been used to emphasise the importance of moving beyond the levels of knowledge acquisition, skills development, and even beyond motivation where you say you are going to implement your learning. It is easy to debate theory or case studies in the classroom or even to play act in role-plays, but it is what people do that counts.

Trainers as facilitators of learning should keep asking learners questions such as:

- What are you going to do about it?
- What have you done?
- What have you learned from your actions?

These are simple questions but eventually become stock questions which people ask of each other. There are no hiding places; either you have taken action or you have not. Individuals should start by reviewing their own actions and learning. They are in the best place to judge their own unique learning experiences.

Learning can be described in quantitative (“I have reduced costs by 23 per cent”) or qualitative terms (“I have learnt how to adapt my influencing style when dealing with the Chief Executive”). The role of the training facilitator is to help individuals and teams define the measures and articulate and share their learning.

Trainers should stop worrying about having a box of tricks, ice-breakers and gimmicks with which to impress their subjects. They will add more value by repeatedly asking these three questions. Within the next five years the job title of Training Officer (with its military connotations) and Training Manager (with its empirical connotations) will be dead and gone. The time has come to focus on learning which occurs in the place of work and which follows the action. In the words of Professor Reg Revans, IMCA Founding President and founding father of action learning “Learning is cradled in the task . . . Learning involves doing”.

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