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July 2020   Issue Map

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TD MAGAZINE

Connect the Dots

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Use business impact mapping to demonstrate the chain of events through which learning improves business outcomes.

All talent development professionals would like to think that their learning programs have an impact on business success. But do the programs really affect strategy and bottom-line results? Is the TD function really moving the needle?

Probably not. Indications from a host of studies, including our own half decade of research, sadly seem to suggest that training strategies may have little impact on the business.

That bleak assessment is echoed in the 2019 McKinsey article "The Essential Components of a Successful L&D Strategy," which reveals that "Only 40 percent of companies say their learning strategy is aligned with business goals. For 60 percent, then, learning has no explicit connection to the company's strategic objectives." The Association for Talent Development report *Effective Evaluation: Measuring Learning Programs for Success* concurs, revealing that only 40 percent of TD professionals believe their organizations' "evaluation efforts were effective in meeting business goals."

The anatomy of failure

We learned the bitter truth about training's chronically poor performance in the course of our five-year rigorous evaluation of some two dozen training programs in firms such as Boeing, Logitech, Business Development Bank of Canada, and WestJet airlines. The goal of the research, sanctioned by the Government of Canada, was to encourage greater national investment in training by demonstrating its positive impact on the balance sheet.

The study outcomes were a bombshell. Despite the fact that organizations had been recruited into the study based on their own convictions that their learning program would yield positive return on investment, more than half failed—instead receiving negative ROI.

But we learned much from failure. Because all programs were evaluated in a uniform, systematic manner, we received rare insights into the anatomy of failure—what works and what doesn't. Our poststudy analysis revealed that most failing programs shared several flawed practices in common.

The number 1 reason for failure? Lack of alignment.

In study after study, we found the same puzzling lack of consensus among key stakeholders about the learning solution's primary goals. Frontline managers, senior leaders, training developers—each key player seemed to have completely separate notions of the program's main purpose. It comes as little surprise, then, that so few achieved success.

Those lessons learned triggered an effort to develop techniques to help organizations improve impact. One approach is business impact mapping, which gives organizations a quick and easy-to-use technique to ensure training initiatives are connected to business needs.

Our approach, evolved from Robert Brinkerhoff's pioneering work, helps get all players on the same page and creates a clear line of sight between the training solution, job performance, and business outcomes. We are convinced that business impact mapping would have sharpened the focus and greatly enhanced the impact and ROI of every one of our study programs.

Unfortunately, the technique of connecting the dots for outcomes is a critical procedure missing from standard instructional design practice.

Components of an impact map

Impact mapping gives developers a powerful new tool to gain consensus. It becomes the road map—a high-level summary of desired results at three key program junctures (the learning value chain): capability, job performance, and organizational outcomes. It answers these questions:

- What knowledge, skill, attitudes, and intentions will participants acquire as a result of participating in the training? (capability)

- How will this affect their workplace performance? What new skills will they display? What actions will they take? How will things change? (job performance)

- How will the organization benefit? (organizational results)

Figure 1 shows a typical impact map developed to diagram the chain of outcomes ensuing from a training program for call center support training. The map was developed through a consensus-building process involving representative stakeholders—for example, instructional designers, line supervisors, and senior division or department managers.

The first column lists the skills and knowledge (capability) support agents should acquire as a result of the training program. In this example, the capability link includes a blend of product knowledge, customer service skills, and call management skills, such as awareness of when to escalate issues to the secondary level.

The middle column describes the key job performance outcomes program developers expect to observe once participants are back at their jobs: more accurate and timely problem diagnosis and call escalation.

Finally, because of improvements in job performance, it is hoped the training program will have an impact on organizational results. In our example, some of the results are tangible—that is, they are easy to track, measure, and convert to monetary value. Here, tangible outcomes include reduced call-handle time and more efficient use of secondary-level agents. The map also identifies intangible outcomes, such as improved customer satisfaction and employee engagement.

Conduct a mapping session

The mapping process works best when the design team takes ownership of the process and produces a rough draft of what outcomes they hope the program will achieve. The key point here is that the design team is not wed to this draft; it is just a trigger to begin the conversation with the stakeholders.

We've learned an important lesson from conducting literally hundreds of focus groups and mapping sessions: Groups are quick to engage if they have something to critique. In comparison, asking them to generate ideas on their own from the ground up is a steeper challenge and takes a great deal longer. The design team will cover more ground more quickly if it starts with a draft map for stakeholders to review.

Typically, the mapping session includes a small stakeholder group (three to six people) comprising instructional design and subject matter experts; managers or supervisors of the participant group; and a senior manager, program champion, sponsor, or client.

During the collaborative sessions, preferably conducted face to face, the group revises the draft outcomes, adding or deleting them, gradually building consensus on the essential purpose of the training and prioritizing program outcomes and alignment. We've found that the simple act of filling in those three columns with the right group around the table generates productive conversation almost as valuable as the map itself.

Outcomes

While initially we developed business impact mapping to help groups clarify and align their training initiatives' key outcomes, we soon discovered there were many other ways mapping drives impact.

Focuses attention on results. Impact maps encourage a results-focused culture and more rigorous thinking about outcomes at all levels—learning, job performance, and the organization.

and connect the dots between training and their critical success metrics.

For senior management, it's often their first time seeing and completely appreciating the full learning value chain. Following a series of pilot trials in one global Fortune 500 client, all business lines mandated impact mapping for all new programs.

Invites productive dialogue. These sessions also encourage stakeholders—program designers, line managers, and senior management—to discuss the value of training from their perspectives (or reconcile conflicting views). And as a result of this focused dialogue ...

Gets everyone on the same page. When groups find that they hold conflicting opinions—as often occurs—the session provides a process for resolving differences and finding consensus. For those at the table, it may be the first time that they come to see the training solution from the others' points of view.

Importantly, the mapping session often deepens the design team's insights into what senior management really wants from the training initiative. For frontline managers, it's an opportunity to share their views on how workplace behavior needs to change—what's appropriate, practical, or even possible. It's an essential reality check on what may work and what won't.

There are few activities in traditional course design that so effectively occasion this synergistic dialogue among diverse stakeholder groups.

Lays essential foundation for evaluation. Impact mapping informs what will be evaluated (key indicators), at what levels (links in the value chain), and when (timing of data collection).

Retains the big picture. In complex projects, it's easy to lose sight of the big picture. Impact maps are evergreen documents that keep the big picture in clear view. For many of our larger clients, their impact maps serve as institutional memory. As staff and leadership come and go over time, the maps retain a vivid snapshot of the outcomes and rationale behind their original development.

Reveals enablers and barriers. Not surprisingly, the impact mapping session offers a rare opportunity to surface the enablers and barriers to impact at all links in the learning value chain—immensely valuable information for enhancing or achieving intended results (see Figure 2). The collective wisdom of the stakeholder group sheds light on the key factors—unique to the learners, timing, and organizational culture and context—that can make or break the initiative's success.

The left column of Figure 2 identifies factors at the capability link that could help boost the transfer of knowledge and skills to job performance, such as manager awareness and work shift flexibility. The risks to transfer (barriers) also are listed.

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A clear and simple road map

participants who had already completed a draft map by the end of the session.

Once created, the impact map clearly and simply—in a page or two—describes the primary program intent for all audiences in the organization. The map is a high-level document that is easy for anyone to read and understand. Some groups use their maps to market their programs, aptly describing their potential benefits. Others attach the map to budget requests or share it with vendors for course development or acquisition. Sometimes TD teams share the maps with training participants, participants' managers, and course facilitators to align everyone involved with the program's goals.

Our five years of ROI research made one thing abundantly clear: The path to success begins with a good—clear and simple—road map. Had it been available at the outset for our research partners, we believe impact mapping would have helped many of the participating firms avoid failure.

In the standard instructional design process, however, this critical technique or element is woefully missing. While designers (ourselves included) generate mountains of design documents, typically absent is that single page that succinctly depicts the line of sight from training to job performance and business results. And, ironically, that is the one page senior management most wants to see.

Without that consensus-driven sight line, designers and developers often assume their training solution is aligned to business outcomes, when, in fact, this crucial alignment may be weak, inaccurate, or most likely altogether lacking. And senior stakeholders, without this strategic road map, will arrive at their own conclusions about the training initiative's value—or worse yet, fail to see any value at all.

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Bailey develops robust evaluation and multiple-choice evaluation tests to leading clients such as the Massachusetts Institute of Technology (MIT) and Harvard Business Publishing (Harvard ManageMentor). He develops and facilitates evaluation workshops for a range of clients, including the Central Bank of Brazil, Emirates, Boeing, Scotiabank, the Canada Revenue Agency, Health Canada, Canada Food Inspection Agency, CIBC, and ArcelorMittal. Bailey has authored many leading research studies investigating the links between an organization's investments in training and its impacts on performance, business outcomes, and the economy.

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Lynette Gillis, PhD, is a cognitive and educational psychologist and an internationally recognized authority in the design, development, and evaluation of workplace learning. For almost four decades, her career has focused on improving existing design and evaluation methodologies to help organizations such as Harvard Business Publishing maximize the effectiveness and impact of their learning investments. Her deep understanding of learning and cognition is buttressed by decades of practical, firsthand experience designing and evaluating learning