


# Client Driven Evaluation

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## HP Workforce Development and Organizational Effectiveness (WD&OE)

- Mission: Develop the most competitive and committed workforce in the world
- WD&OE Organization
  - 800+ WD&OE professionals
  - Organizational model
  - Six key roles
- Role of WD&OE Global Operations
- Role of Performance Challenges Corporation
- Volumes and reach
  - Countries: >160
  - Learners: 156,000
  - Course offerings: 11,160
  - Completions/mo: 115,000
  - New Enterprise e-learning offerings: 20 in next 6 mos



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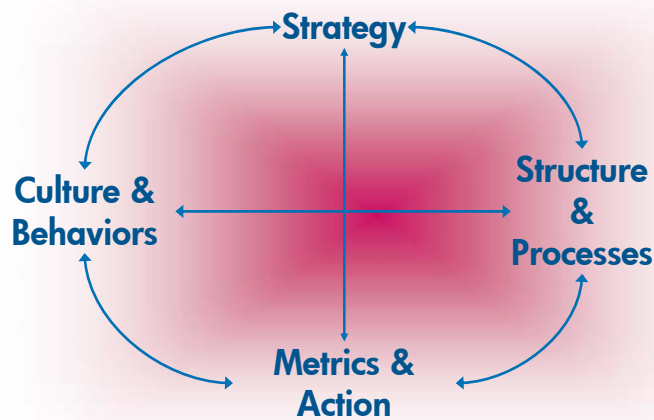


## The State of WD&OE: 2002

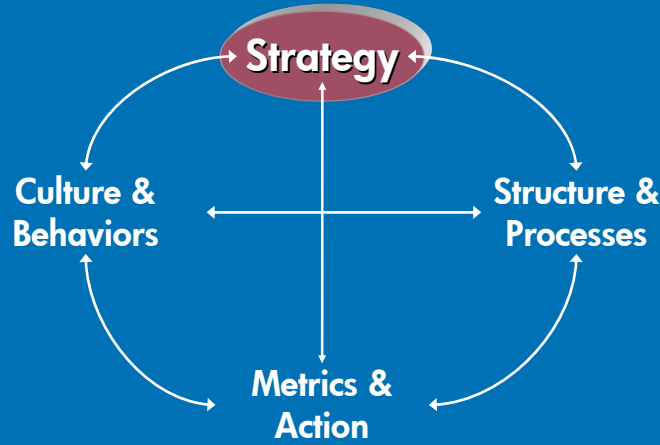
- No enterprise wide evaluation strategy
- Lack of integrated processes
- Lack of clear roles and accountabilities
- Insufficient breadth and depth of evaluation competencies
- Pockets of competency, experience and advocacy
- Pervasive Level 1; localized Level 2; examples of Level 3, 4
- Metrics for Level 1, but not integrated into WD&OE Balanced Score Card
- Lots of data, often not actionable or linked to the clients' business challenges



## Leveraging the HP Leadership Framework



# The Enterprise Evaluation Strategy




## Developing the WD&OE Evaluation Strategy



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## WD&OE Evaluation Philosophy

- All WD&OE initiatives start with an evaluation strategy
- Metrics for success are defined by the business
- We are committed to make decisions about WD&OE solutions and their effectiveness based on evaluation results
- Our clients' business profoundly influences the evaluation approach and execution




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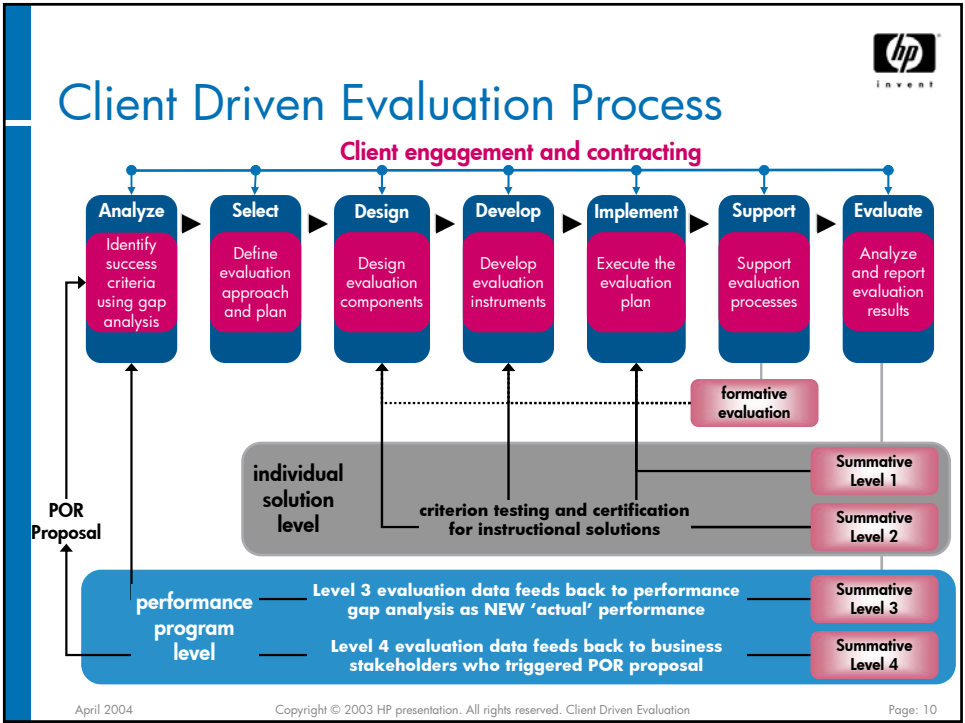
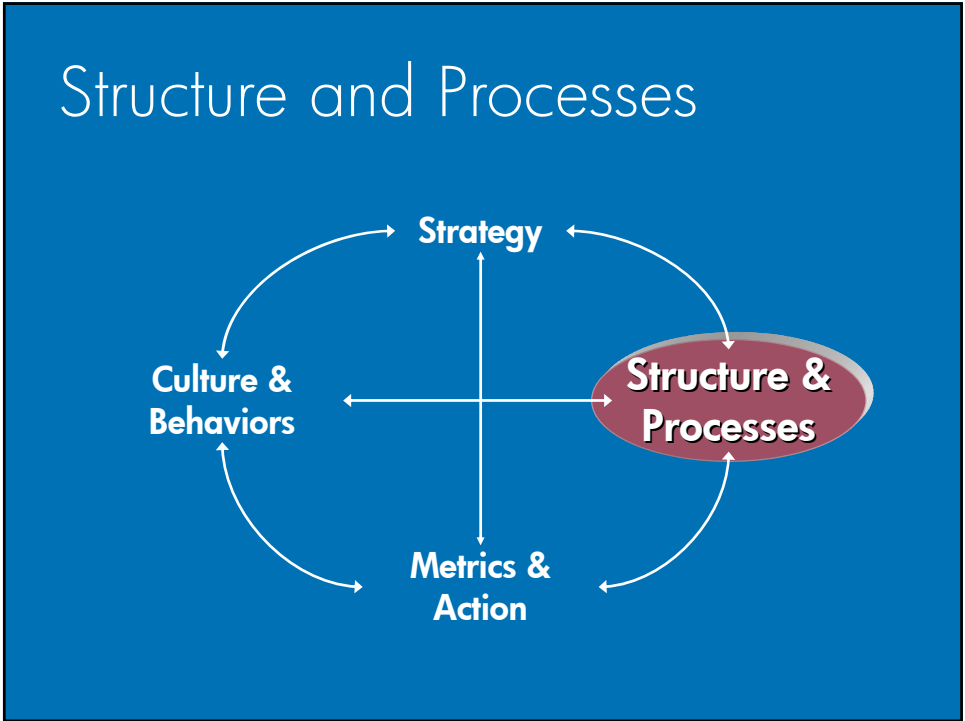
## WD&OE's Global Evaluation Strategy

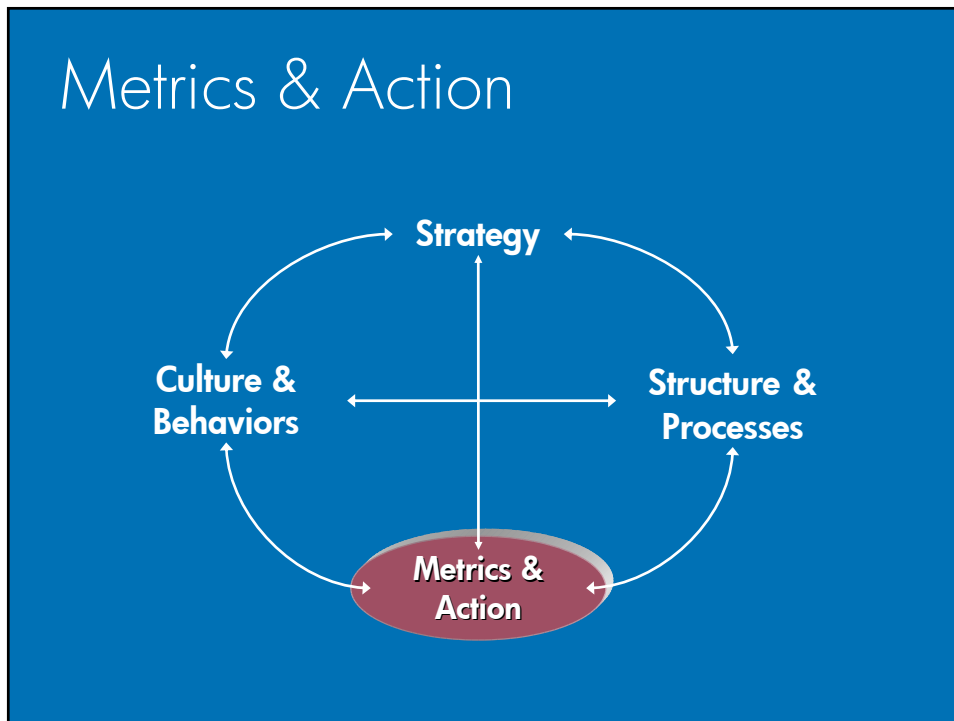
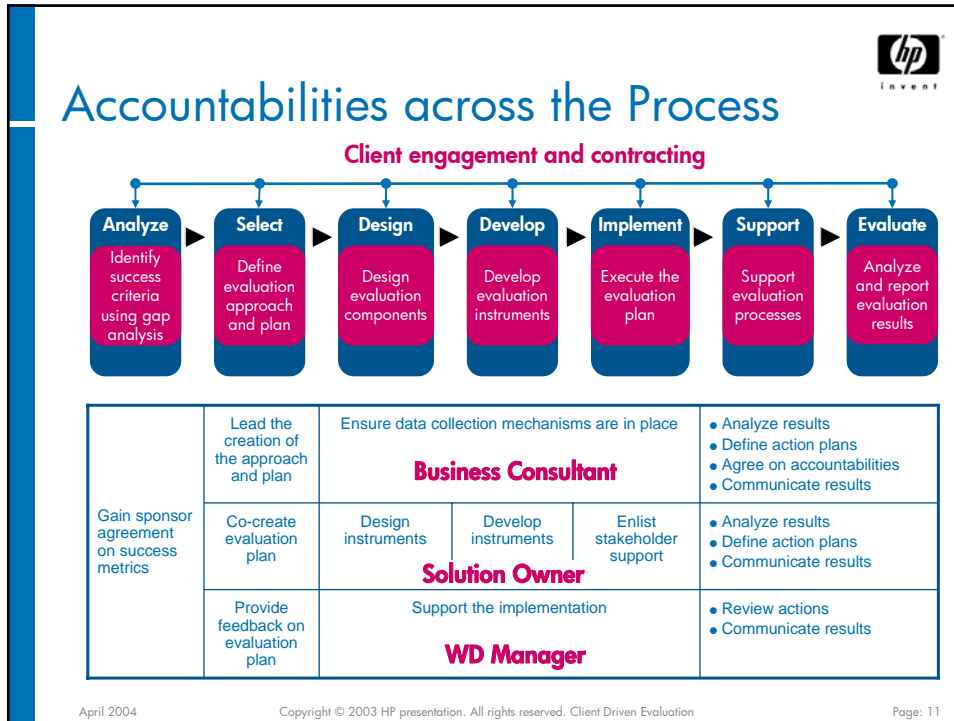
Implement global processes and drive decisions to the appropriate level

- Assess and present solution results quarterly
- Invest in solutions that accelerate performance of our people and the business
- Drive solution portfolio improvements based on evaluation data
- Develop WD competencies in measurement and evaluation
- Implement common tools, processes and systems to enable consistent application of evaluation methods




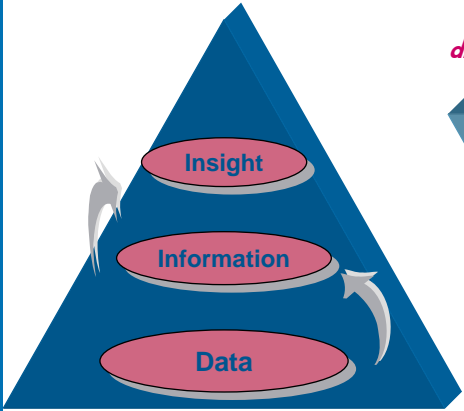
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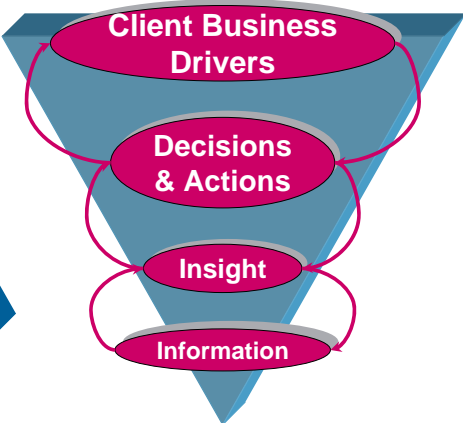
## Shifting the Approach: Data is not the Driver






*We often start with data, hoping to find insight*

*Instead of starting with client business drivers to determine the information needs*



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## Critical Components of Evaluation: Lessons Learned



**Client engagement and contracting**

**Analyze**

Identify success criteria using gap analysis

**Select**

Define evaluation approach and plan

**Design**

Design evaluation components

**Develop**

Develop evaluation instruments

**Implement**

Execute the evaluation plan

**Support**

Support evaluation processes

**Evaluate**

Analyze and report evaluation results

**Metrics**

- Quality never assumed; always tested
- Scope, breadth, depth, and number of metrics scrutinized for the select few
- Tight cause-effect link
- Trusted instrumentation

**Data**

- Data integrity never assumed; always tested
- Integrate quantitative & qualitative

**Design & Execution**

- Containment and influence (not control)
- Don't let technology drive execution decisions
- Consider data privacy issues

**Analysis & Reporting**

- Client facing: Simple; backroom: fancy/complex
- Proving vs. discovery
- Interpretable, drillable, actionable
- Interpretation is testable

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## Metrics and Data

- Outcome, process, or both?
- What and who makes “it” important (all outcomes are not created equal)?
  - Who makes it important?
  - Why do they do it?
  - Does the client believe in it, value it, act on it?
- How are you going to get “it”?
  - Adopt, adjust, create?
  - Who are the sources?
- What does “good” look like? Can you rely on the results?



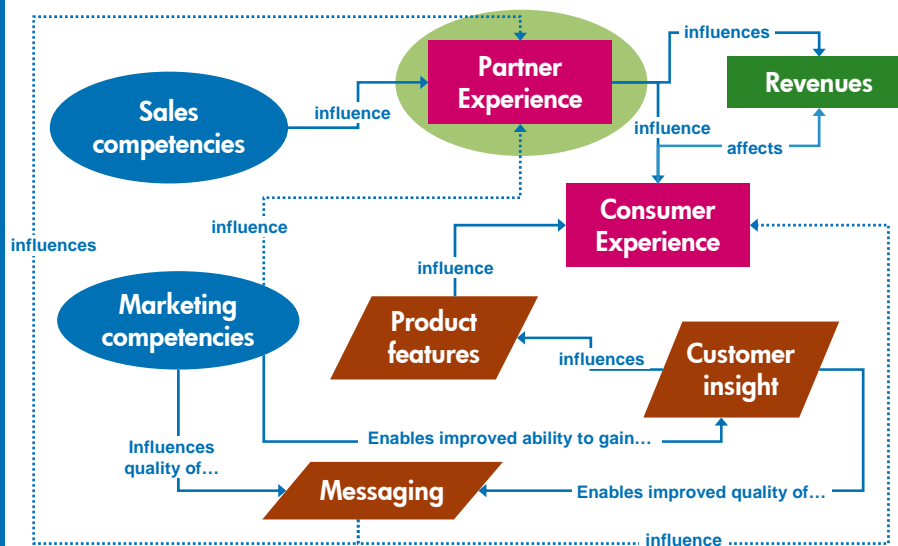
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## Example: The Chain of “Influences”



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## Design and Execution

### The Client (dialogue)

- Multiple perspectives, diverse specialties and a broad network satisfies varied information needs
- Clarity of all client resource needs and accountabilities
- Problem anticipation and avoidance
- Complete-ability

### The Practitioner (backroom)

- Design considers constraints of the situation
- Resource requirements/ accountabilities defined and assigned
- Containment (and *pseudo-control*) efforts
- Consideration and adoption of alternative data collection approaches

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## Analysis and Reporting

### The Client

- In the language of their business
- Cater to the different audiences / levels of interest
- Understandable and actionable
- Credible and defensible
- Stands up to scrutiny

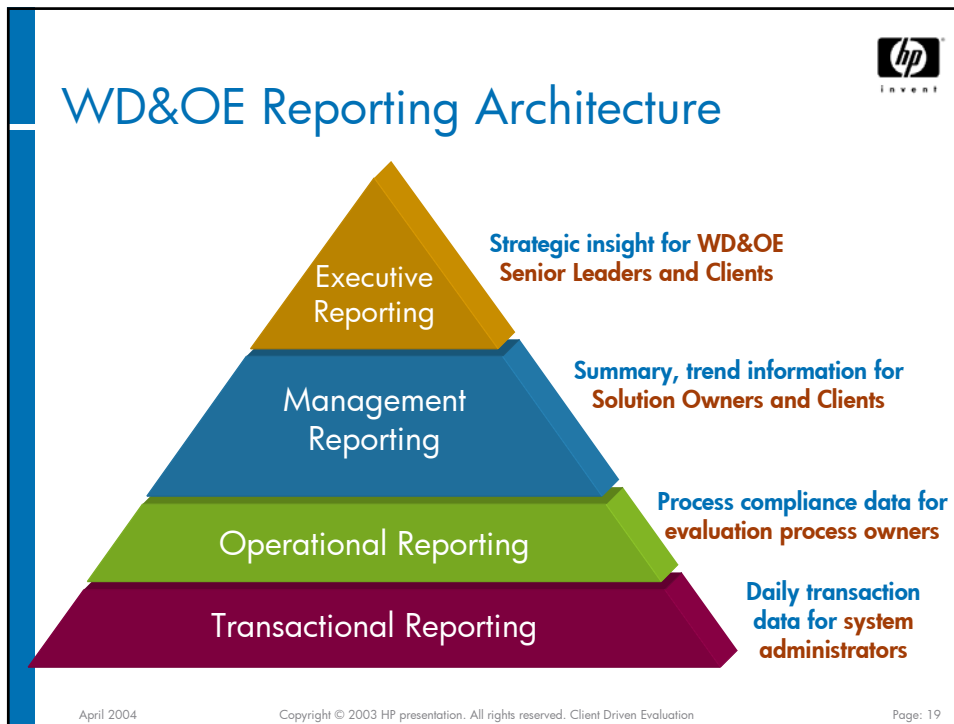
### The Practitioner

- Do the results make sense?
- The perils of "dirty" data
- Analysis to suit the audience (sophistication, level)
- Be prepared for the "yeah, but" factor
- Ultimately should feed into the decisions the client needs to make

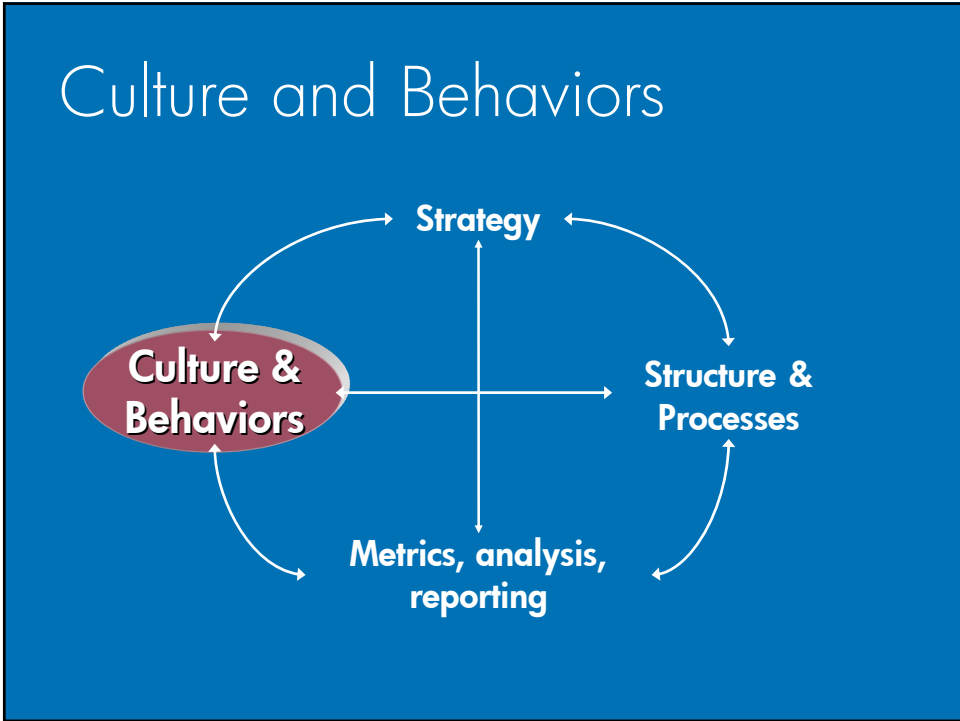
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- 
- Procurement Risk Management Case**
- Presenting problem
    - Simplistic, traditional contracting practices
    - Contracted prices too high; short supply at critical times
  - Cause analysis revealed:
    - Performance metrics caused buyers to maintain traditional contracting behavior
    - No tools to help determine best type of contract
    - No easy access to expert support on pricing and supply issues
  - Metrics:
    - Material costs
    - Assurance of Supply (AoS)
  - Design and execution
    - Interventions linked to the presenting problem
    - Simple design: pre-post
    - Execution: implemented interventions, monitored key metrics, tracked progress
  - Analysis and reporting
    - Simple charts and reports with meaningful results
    - Results: \$460K savings and increase in AoS
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## Moving toward a Client-Centered Culture



- Change the focus: Start with the end in mind in the language of the client
- Shift the relationship
- Define clear success metrics
- Create a tight link between business drivers and the interventions
- Drive it from the top
  - Stay the course
  - Embed evaluation outcomes in the Balanced Scorecard
  - Link to TCE = Total Customer Experience
- Continued advocacy
  - Action learning workshops
  - Specialized, focused efforts to model the desired behavior

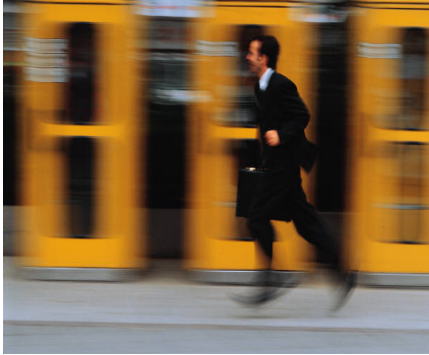


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## Developing Evaluation Competencies

- Desired vs actual competencies
- The roadmap
- Communication
- Core fundamentals
  - E-Brown bags:
  - "Getting Started with Evaluation"
- Evaluation specialties
  - Test writing and test use
  - Mentoring on specific projects



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## Evaluation Development Roadmap

Core fundamentals
→
Developing a specialty

Business Consultant	<b>Getting Starting with Evaluation</b> <ul style="list-style-type: none"> <li>■ WD Evaluation Strategy</li> <li>■ Applying the evaluation process</li> <li>■ Engaging with sponsors on solution metrics</li> <li>■ Determining the level of evaluation</li> <li>■ Identifying when to seek expert help</li> <li>■ Identifying data analysis/ reporting approach</li> </ul>	e-brown bags – Coaching- Mentoring Membership in professional associations	Gap analysis, id success criteria	Id levels; plan approach	Gather and interpret data	Report results
Solution Owners			Identify levels of eval required	Write tests, design collection instars	Reports results	
Delivery Consultant			Gap analysis, id success criteria	Gather / interpret data	Report results	
WD Manager			Interpret data	Report results		

WD Electronic performance support, job aids and communities of practice

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## Building Communities

- The Evaluation Steering Committee
  - Business and functional representatives
  - Voice of the business and their clients
- The passionate advocates
  - Colleagues who see value in measurement and evaluation and who will advocate with their peers and management
  - Colleagues who model the desired behaviors: planning, executing and use



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## Lessons Learned

- It's all about integration and connecting the dots
- Make sure you are speaking the same language
- Make it simple and understandable
- Everyone is an expert in their own opinion
- Maturity matters: Be realistic about your starting point
- This is not just about the "hardware" but the "software" as well



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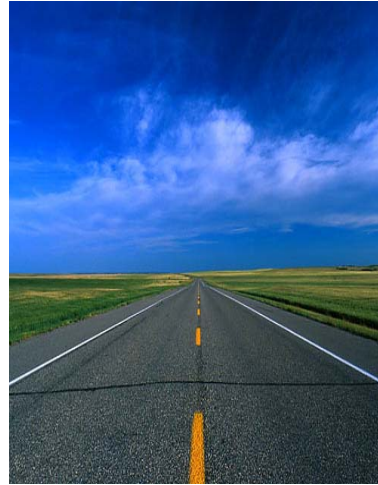
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## WD&OE's Short Term Roadmap

- Complete system rollout
- Augment tools and job aids
- Build deeper and broader competencies
- Tighten up the balanced scorecard for WD
- Develop a robust reporting architecture
- Drive culture shift



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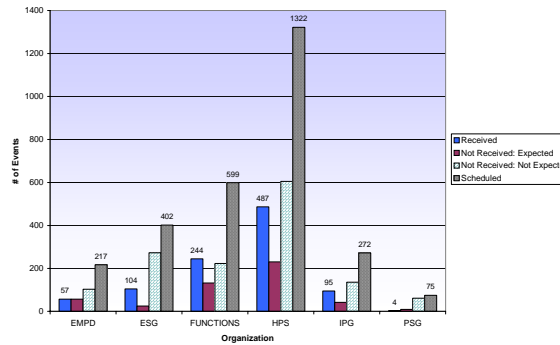
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# Appendix

## Operational Reporting



- Process compliance
- Return rates
- Data validity
- Demographic profiles



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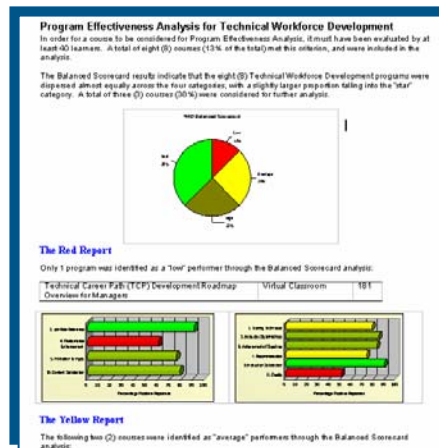
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## Management Reporting



- Year to year trends
- Comparisons against HP norm
- Vendor performance
- Red, Yellow reports
- Cultural differences

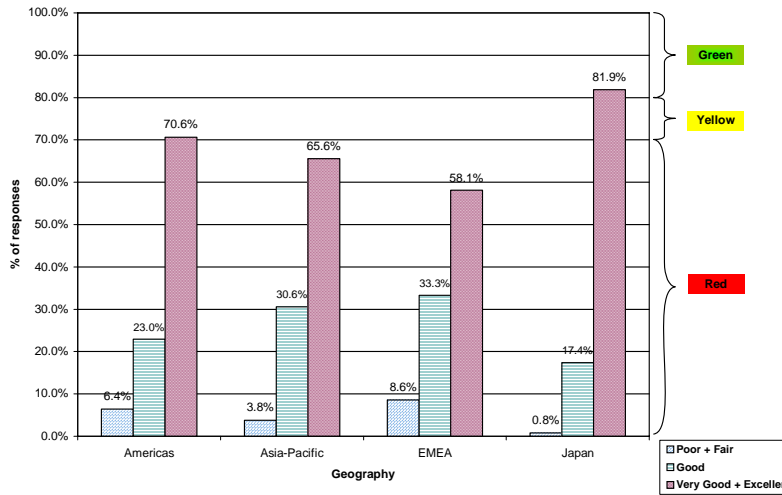


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## Management Reporting: Identifying Cultural Differences



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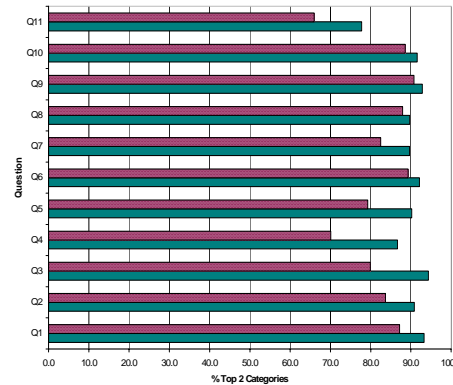
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## Executive Reporting



- Balanced scorecard
- TCE performance
- Solution portfolio performance
- Insights, linkages to other organizational initiatives



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