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IT'S BIGGER THAN BIG DATA - METRICS AND MEASUREMENT WITHOUT A STRATEGY IS JUST DATA

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Introduction

Metrics is a hot topic both in T&D and the broader talent arena. Across all of HR, there is an increased desire to create accountability for results. In this drive for greater accountability, leading edge HR functions have concluded that decisions must be evidence-based, leveraging the gold mine of data that resides within its network of systems. HR is now squarely in the Big Data game with the potential to mine its wealth of talent information to not only report, but possibly predict outcomes based on behavioral indicators.

Unfortunately, not all talent organizations have received the message. In T&D specifically, measurement, evaluation, and analytics are often viewed as tactical activities relegated to making course by course improvement decisions. Many organizations have fallen into a dangerous trap because their business leaders are not explicitly asking for information. The reigning viewpoint is, "if no one is asking, why go through all the effort to produce reports that will likely never be reviewed or used?"

Their skepticism is fair. How many reports are generated each year and what is actually done with them? Do the recipients want them? Is the data useful? Is it presented in a format that is meaningful to the recipient? Does it answer important questions (i.e., Are we using resources

efficiently? Are we producing high quality solutions that improve the performance of our employees?; Are we making a positive impact on business results?).

For most T&D organizations, their Big Data is just that…data. At Grant Thornton, in the last twelve months alone, we gathered over 750,000 evaluation question responses. Add that to our LMS, HR, and T&D financial data and it is clear that we are not suffering from a lack of data. Our challenge, however, was to transform this Big Data into Big Insights and to do that, we needed both a strategy and a tactical plan for bringing it to fruition. This article shares the Grant Thornton journey as we transformed our measurement and along the way, recognized that it is "Bigger than Big Data."

Background

Under the direction of Chief Learning Officer, Mark Stutman, our learning leaders collaboratively developed a learning strategy to guide our team over the next few years. Gathering the national learning leaders and select national heads of practice, we defined our mission, vision, and drivers. The team grappled with tough questions like, "Why aren't we producing better business professionals?" and "Why aren't we visibly impacting the business?" As we answered these questions, we realized that we needed to change our learning and development approach.

In our strategy development process, we committed to building the necessary competencies and capabilities to enhance performance and our competitive advantage. Additionally, we agreed that metrics and analytics must support this new strategy to ensure the learning organization provides value to the firm. One pillar of the overall learning strategy focuses on measurement and stated that we would "invest in learning with demonstrative value." While simple to say, we realized that this one statement, in and of itself, implied a high degree of change. We needed to determine how to:
  * Measure not just the efficiency, effectiveness, and impact of programs, but of the entire learning function
  * Transform measurement from an after-the-fact tactical activity to a strategic process that informs annual investment planning
  * Engage the business throughout our solution design and development process, and create a culture of mutual accountability for results
  * Enable T&D to operate like a business

These considerations led us to realize that we had to go beyond the concept of Big Data. We needed a separate but aligned measurement strategy. Moreover, this strategy needed to be supported and driven collaboratively by T&D as well as the firm's leaders.

Before developing the measurement strategy, we embarked on a communications campaign. We met with our learning steering committee, senior leadership and the CEO to socialize the key learning initiatives. This process built the needed top level support.

Our goal was to ensure the firm leaders understood the importance of a measurement strategy and engage them in the process for change. This level of commitment helped us to gain valuable input and accelerate our process. Once we had their buy-in we were ready to initiate the measurement strategy development process.

> *We can't solve problems by using the same kind of thinking we used when we created them.*
>
> ---Albert Einstein

Bring the Best Resources

Getting senior leadership buy-in was an important first step that also carried with it a great responsibility to get it right. We had driven numerous projects in the past but had no one on staff who was a true expert in learning measurement. After spending months researching, reading books, and speaking with industry leaders, we recollected a quote by Albert Einstein, "We can't solve problems by using the same kind of thinking we used when we created them."

A transformation of our Strategic Learning function required new and fresh thinking. We needed to bring in experts in measurement to guide us and bring credibility to the work. Because our leaders believed strongly in what we were doing and we had already laid the groundwork, we were able to engage KnowledgeAdvisors, a Talent Analytics firm, to help us develop our measurement strategy.

Developing a Measurement Strategy

KnowledgeAdvisors takes a unique approach to its measurement strategy effort. They realize that changing how, when, what, and why organizations measure their results requires more than technology and amassing data. Based on work by Jay Galbraith, they have designed an evaluation model comprised of 8 key dimensions (see Figure). When all dimensions are implemented, Grant Thornton will have created sustainable measurement and evaluation within the organization. Equally importantly, the evaluation practices will drive greater efficiency and effectiveness within the learning function and will produce greater value for the organization.

When KnowledgeAdvisors presents this model, they reference a table adapted from Galbraith that demonstrates the importance of each dimension to the overall health of an organization's evaluation system (see Table below).

KnowledgeAdvisors makes the case that too many organizations focus on two or three dimensions; typically the technology to gather large amounts of data efficiently and cost effectively, standards to enable comparisons to benchmarks, and reporting to deliver results quickly to stakeholders. They explained that this approach is superb at providing a large supply of data to the organization but does not address the demand side of the equation. Lacking leaders who require quality and meaningful data for decisions, an integrated process that requires success measures at the outset, and a culture that is data driven, organizations fall into the trap of Big Data but small to no insights.

Dimension	If:	Then:	Impact
Leadership / Governance	No senior leadership oversight for measurement	**Confusion**	• No criteria for decision making • Difficult to get enterprise-wide adherence
Processes	Lacking an integrated end-to-end process for measurement	**Misaligned goals**	• Misallocation of resources to programs • Delayed insights into value of programs on business outcomes
Roles/ Accountabilities	Measurement accountability not clarified for process	**Loss of focus**	• Lack of process oversight • No mutual commitment to drive outcomes

Dimension	If:	Then:	Impact
	stakeholders or learning practitioners		
Skills & behaviors	People not trained or competent in measurement	**Low Performance**	• Misuse of measurement and evaluation methods • Misinterpretation of data
Standards / Tools	People are not enabled	**Wasted effort**	• Non-value added variation in measurement • Inability to aggregate or slice/dice data
Technology	Multiple or no common platforms	**Fragmentation**	• Inability to integrate data • Loss of capacity due to manual manipulation of data
Results Utilization	Data doesn't drive decisions	**Gridlock**	• Long decision and cycle time • Difficult to continually improve
Culture	Doesn't reinforce desired behavior	**Inertia**	• Reversion to old behaviors • Decisions driven by gut vs evidence

[1] Adapted from "Designing Dynamic Organizations," Galbraith, Downey, Kates, 2002

Developing the Strategy

To establish the strategy, KnowledgeAdvisors used a three phased process.

It began with a current state assessment to determine Grant Thornton's capabilities in learning measurement. The second phase focused on the future state to identify our aspirations for measurement and the capabilities we expect to establish within a three year horizon. The final phase built the strategy and roadmap to close the gap between the current and desired states. The roadmap provides detailed tactical implementation steps to guide our measurement activities and investments to realize the future state.

Current State of Measurement at Grant Thornton

Our current state assessment involved consultants interviewing T&D leaders as well as our senior Business Leadership team and the CEO. The involvement of business leaders was critical and ensured that our measurement strategy would incorporate the voice of the business in our

long term approach. The consultants also deployed their proprietary maturity diagnostic tool to gather quantitative data in addition to the qualitative interview data.

The results did not surprise our learning leadership, and in fact validated what most had observed in their day to day work.

KnowledgeAdvisors identified key strengths in our organization, including:
* A strong desire for measuring the impact of learning, not only by T&D leaders, but equally important, by business leaders
* Wide use of scorecards and reports to drive program level improvements
* A single, common technology platform to collect learning evaluation data
* A standardized learning management and compliance tracking system.

At the same time, KnowledgeAdvisors recommended areas for improvement:
* Integrate measurement into the existing learning design and development process
* Enhance measurement and evaluation capability of the team
* Develop a set of balanced, common, consistent measures across the organization that demonstrate our efficiency, effectiveness, and impact on the business
* Optimize our technology platform to simplify use, enable robust reporting, and employ scalable methods to demonstrate business impact

Throughout the process, our consultants captured comments and feedback. A theme emerged from this qualitative feedback: Just having the data doesn't get you where you need to be:

* "We don't do a lot with the data. We have systems in place, but don't do a lot with the information we are collecting."
* "I have data, but not a whole lot of information."

We clearly needed to rethink what we provide, how we use information, and how we tell the story to communicate the value of learning.

A Compelling Future State and a Plan to Get There

The next phase of the process was to develop a future state vision of measurement within our T&D organization. Our consultants facilitated a half-day visioning session with the senior T&D leadership team. Divided into subgroups, the team was given a challenge: articulate world class measurement along each key dimension of the maturity model. What would be different in this new world? How would our role in T&D change and what would we be doing differently?

Our brainstorming envisioned a strong partnership with the business anchored in a value of mutual accountability. We will leverage the discipline of performance consulting to ensure that training is the appropriate solution, but equally important, establish success measures and outcome goals for all solutions before we begin design or development. In our future state, our organization will have a metrics mentality, making decisions based on credible, accessible, and meaningful data and information. Our governance will be both bottom-up and top-down, incorporating the voice of the business and the voice of our learners. Finally, the data we gather, synthesize, analyze, and report will enable us to manage T&D, demonstrate our impact on the business, and provide meaningful insights to both T&D and business leaders.

The final phase of the strategy development process was to develop the tactical plan. This effort focused on three phases of work:
* Demonstrating short term quick wins to ensure that we optimized our existing investment in technology
* leveraging our new performance consulting rollout to change the conversation with the business
* aligning our T&D measures with the critical few measures identified by our CEO and Senior Leaders.

Our short term effort also focused on establishing a single owner for executing the tactical plan. As we establish our mid and long term plan, we will focus on building measurement maturity and creating a data-driven culture. Our success with our strategy will be measured by increased organizational capability in measurement, pervasive use of our data to inform operational, program, and strategic decisions, and a strong partnership with the business.

Final Thoughts

For those that are struggling with big data overload, it is important to remember that data does not drive business. How data is used will make the difference in how impactful your organization will be to drive results. To harness the power of the data you need to think bigger and start with a strategy.

Key insights from our strategy development:
* Get leadership involved early. Involving business leaders in the process will help to gain support for your work and ensure that you are aligning with the business strategy.
* Look holistically at all the dimensions that affect measurement. The data and measures are important, however, if you don't look at other areas which affect the demand of the data such as leadership and utilization then you will be missing a key ingredient for success.
* Begin small and build. If you wait to have everything in place you may never start. Take small steps, look for quick wins, and plan for continuous improvement.

Grant Thornton is on a journey as we execute on our measurement strategy to advance our measurement maturity. We have our sights set to utilize the abundance of data in a more meaningful way. The strategy is the foundation to ensure that we are using our data to make informed strategic decisions, to invest in learning with demonstrative value.