AEA 2012 Conference Presentation

Employing a Learning Measurement Strategy to Build a Measurement & Evaluation Ecosystem

October 27, 2012

Peggy Parskey, Strategic Measurement Consultant
Shawn Overcast, Senior Measurement Consultant

Who We Are – Client Needs

- ## About CEB

  - A best practice insight and technology company

  - Over 30 years of experience working with top companies to share, analyze, and apply proven practices, we deliver innovative solutions that help you unlock your full potential

  - Proprietary MTM® software

- ## Client Needs

  - Reduce administrative costs and improve productivity of the learning function

  - Improve the effectiveness and application of learning (reduce 'scrap learning')

  - Drive business outcomes

How Most Clients Tackle Measurement

- **What we see**
  - Tactical approach
  - Focus on **supply** of data
    - Implement technology
    - Develop standards and common measures
    - Assign technology roles
    - Build basic M&E skills

- **What we don't see**
  - Strategic approach
  - Focus on **demand** for data
    - The role of leadership
    - Governance and structure
    - Integrated processes
    - Using results
    - Shifting the culture

Supply

Demand

What Should They Do Differently?

- Take an eco-system approach that builds sustainable evaluation capacity balancing supply and demand dimensions

- Create an organization learning measurement strategy for sustainable evaluation practice

- Employ management of change to drive the process
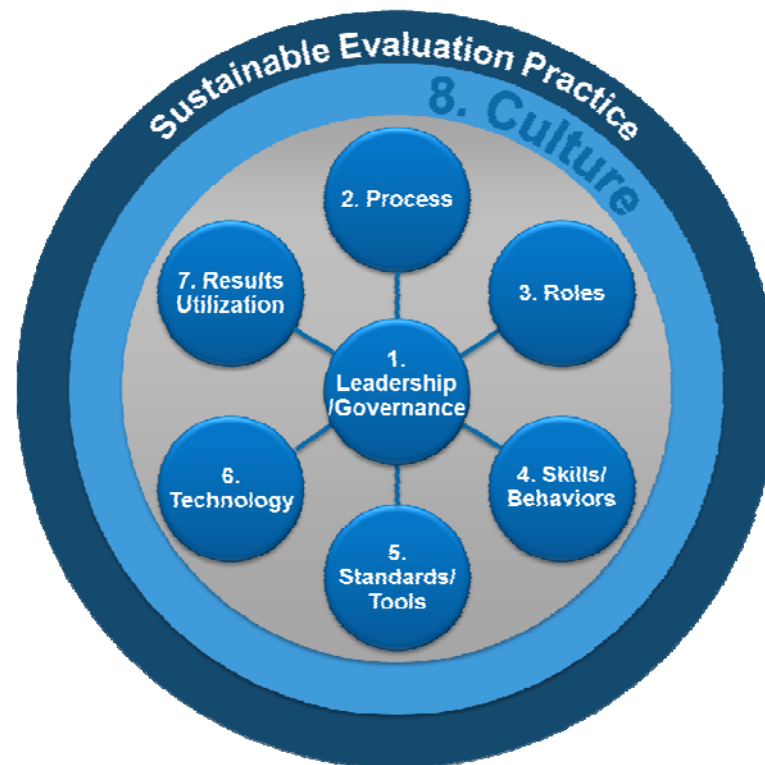
© Parskey Consulting 2016

A Repeatable Change Process & Tools

Phase 1: Assess the Current State

Phase 2: Create the Vision; Establish the Strategy

Phase 3: Develop Roadmap, Milestones and Project Portfolio

Tools
- *Diagnostic instrument*
- *Interview protocols*
- *Best practices*
- *Visioning workshop*
- *Strategy template*
- *Roadmap options and templates*
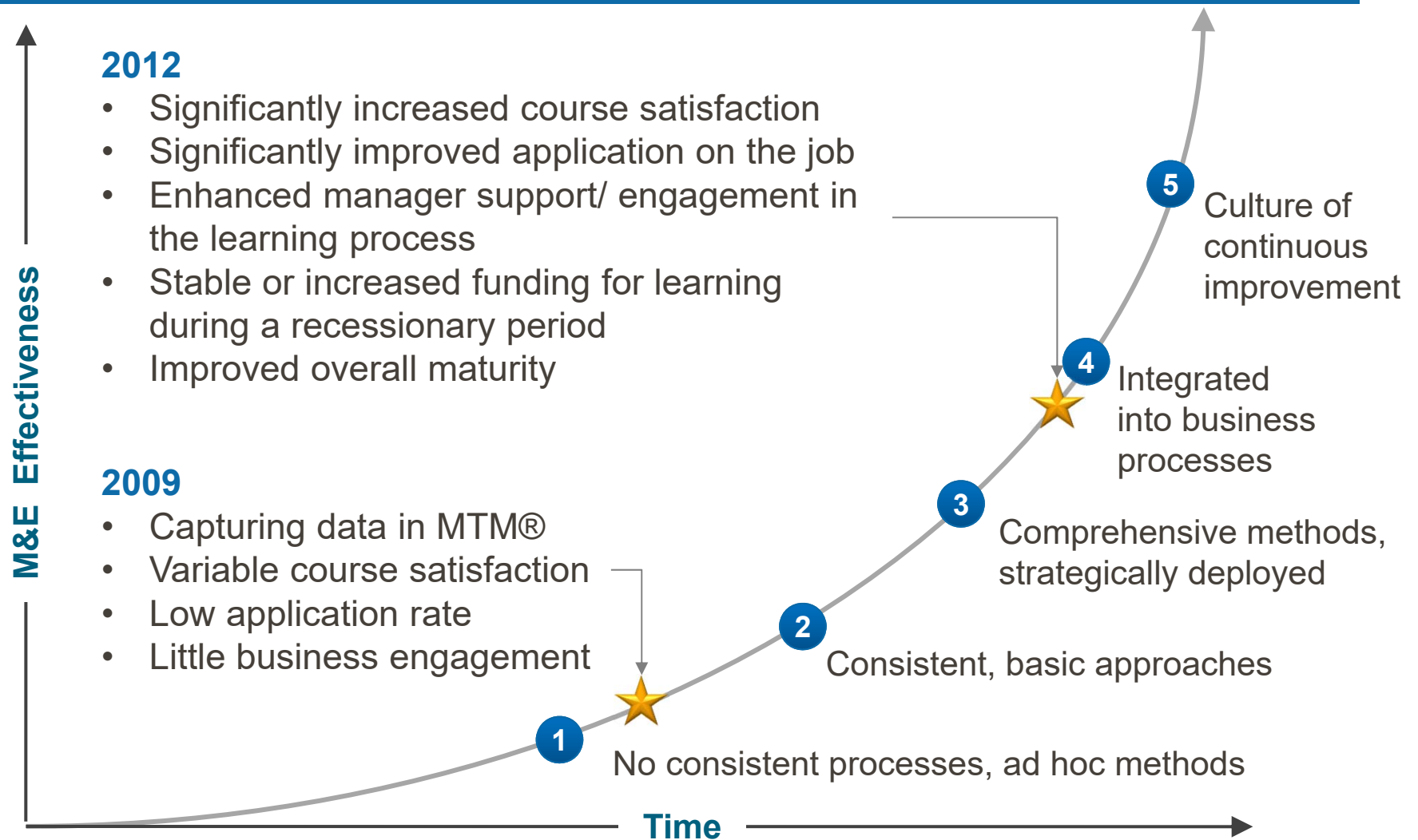- *Risk planning approach*

What Are the Benefits?

- **Measurement Strategy**
  - Shared vision of the future
  - Pull for improved evaluation capacity; accelerates the ECB journey
  - M&E becomes 'sticky' within and outside L&D

- **Roadmap**
  - Identifies portfolio of projects
  - Aligns projects with business priorities
  - Creates accountability
  - Begins the change process
- **Periodic Diagnostic**
  - Provides an unbiased view of progress
  - Enables the team to course correct and improve

Case Study: Consumer Products Firm

M&E Effectiveness (vertical axis)

2012
- Significantly increased course satisfaction
- Significantly improved application on the job
- Enhanced manager support/ engagement in the learning process
- Stable or increased funding for learning during a recessionary period
- Improved overall maturity

2009
- Capturing data in MTM®
- Variable course satisfaction
- Low application rate
- Little business engagement

1 No consistent processes, ad hoc methods

2 Consistent, basic approaches

3 Comprehensive methods, strategically deployed

4 Integrated into business processes

5 Culture of continuous improvement

Time (horizontal axis)

Adapted from Carnegie-Mellon Capability Maturity Model
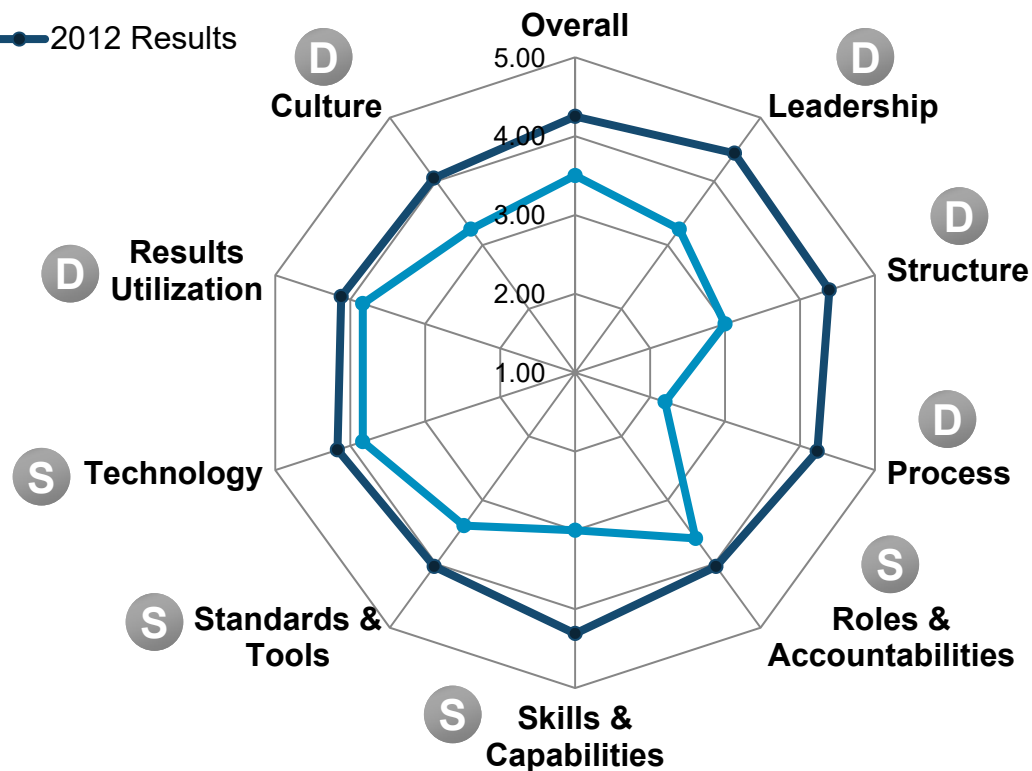
Case Study: Maturity Improvements

D Demand variables

S Supply variables

━●━ 2009 Results

━●━ 2012 Results

- In 2009, the client was strong on the supply variables
- While results utilization was strong, they used the data primarily for tactical decisions
- By 2012, the client had improved its capacity across all dimensions, built out their processes, engaged leadership, developed governance and created a data-informed culture

What's Next?

- Conduct strategy refresh engagements with clients to hone our process

- Establish and monitor success indicators

- Leverage key driver analysis to inform roadmap priorities

- Enhance support capability along each dimension

- Continue to gather diagnostic data and monitor model stability

© Parskey Consulting 2016

References

- Designing Dynamic Organizations; Jay Galbraith, Diane Downey, Amy Kates; AMACON, 2002

- Carnegie Mellon Software Engineering Institute: Capability Maturity Model Integration http://www.sei.cmu.edu/cmmi/

- Learning Measurement Maturity Diagnostic Instrument: © 2012 Margaret J. Parskey & Michael S. Ross

- The Heart of Change; John P. Kotter, Dan S. Cohen; Harvard Business School Press, 2002

- The Heart of Change Field Guide; Dan S. Cohen; Harvard Business School Press, 2005

- Measuring Evaluation Capacity--Results and Implications of a Danish Study; Steffen Bohni Nielsen, Sebastian Lemire and Majbritt Skov; American Journal of Evaluation 2011 32: 324

Contact Information

Peggy Parskey
Principal, Parskey Consulting
pparskey@mjpnetwork.com
(323) 931-6589

Shawn Overcast
Partner, gothamCulture
shawn.overcast@gothamculture.com
(727) 452-2478

parskey
consulting
Measures for Change