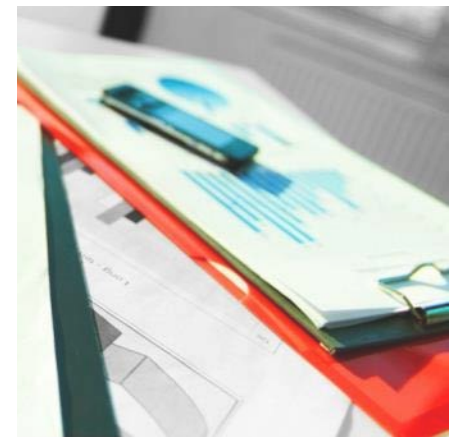


# *The Future of Measurement, Reporting and Management for L&D*



**CTR**  
Center for Talent Reporting

David Vance  
Executive Director

February 21, 2018

# *Focus on Measurement: Adapt to Current Trends*



- Personalized learning, informal learning, formal learning outside the LMS
  - » Need to capture more data from more sources for a complete picture
    - Not new measures, but better platforms and integrated systems
    - Greater emphasis on answers to summary questions
      - Do you have access to enough learning?
      - Does the available learning meet your personal and professional needs?
  - » John Mattox on measuring informal learning
- xAPI
  - » Ability to capture data at detailed level
    - Like duration and satisfaction on a single topic or element
  - » Tim Dickerson for an introduction to xAPI

# *Focus on Measurement: Adapt to Current Trends*



- Predictive analytics
  - » Many applications now in HR but few in L&D
  - » Potential to predict and therefore influence application, impact and ROI
  - » Also to predict which employees will benefit most from certain types of learning
  - » Ken Phillips on how to use “by-name” data to predict and increase application

# *Focus on Measurement: Some Observations*



- Our ability to measure is increasing
  - » More and better software
  - » Data storage no longer a real constraint
- Budgets and staffing not always following
- So, we will need to become better at deciding what to measure and what to do with it once we have it
  - » Hopefully, we get better at starting with the end in mind so we already know why we want the measures and exactly how we will use them

# *Focus on Reporting: Lots of Opportunity for Standardization*



- Recommended measures for public reporting from ISO
  - » Marianne Parry's keynote tomorrow
- Three TDRp reports to organize the measures
  - » Program report
  - » Operations report
  - » Summary report
  - » Peggy will introduce in her session

# *Focus on Management: Even More Opportunity!*



- Especially to view and manage the entire process from needs analysis to project completion and evaluation as one integrated, holistic effort which goes beyond just formal learning
  - » Starting with the end in mind and designing for success, including the all-important role of the goal owner or sponsor
  - » Roy Pollock will address in his keynote
  - » Terrence Donahue will share an example from Emerson
- Demonstrating the value and making the business case
  - » Jeff Higgins on the business case
  - » Patti Phillips and Paul Leone on showing the ROI
  - » Peggy on how much to invest

# *Some Basic Questions*



- Do we need new measures?
  - » We have about 200 for L&D, 800-1000 for L&D and HR
- Do we need a new conceptual framework?
  - » TDRP: Three types of measures
    - Effectiveness, efficiency and outcomes
    - Encompasses Kirkpatrick/Phillips five levels
- Or can we find new ways to apply the existing frameworks and measures to our new challenges?
- Do we need new reports?
- Do we need to manage differently?

# *The Future Includes a Downturn*

- The longest expansion in US history was 10 years (1991-2001)
- We will match that in July 2019
- Recessions are impossible to predict but the next one will come
  - » Recovery from the Great Recession has been slow so the expansion may indeed set a new record
  - » Triggers could include
    - Falling stock market
    - Higher interest rates
    - War, trade policies



# *The Future Includes a Downturn*

## *(continued)*

- Will result in less funding for measurement and reporting, and may require you to manage differently
- What can you do to prepare?
  - » Demonstrate that you are an excellent manager of your current budget and staff
    - Know your costs
    - Set plans. Execute with discipline. Be accountable. Be transparent
    - Show the value and alignment of your key programs
  - » Create strong business cases for learning
  - » Cultivate partnerships with senior leaders

# *Wednesday Keynote*

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## **Earning Your Seat at the Table**

### **Roy Pollock**

CLO and Co-founder, The 6D's Company

Co-author, *The Six Disciplines of  
Breakthrough Learning*



# *Wednesday Noon Comments*



## **Adri Maisonet Morales**

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2016 CLO of the Year

