

KnowledgeAdvisors



Metrics that Matter™ Case Studies

Microsoft Leverages Metrics that Matter to Manage Its Certified Learning Channel

Company Overview: Microsoft is the worldwide leader in software, services and Internet technologies for personal and business computing. The company offers a wide range of products and services designed to empower people through great software—any time, any place and on any device.

Description of Learning Program: Microsoft partners with third party organizations to conduct training and certification on its software products. On a regular basis hundreds of professional learning providers (known as Certified Professional Learning Solutions or CPLS's) train thousands of individuals on Microsoft Official Curriculum (MOC).

Business Objectives of the Program: The purpose of the CPLS program is to educate users of Microsoft technology on how to use the technology to work better. Microsoft must ensure that the learning providers are of the highest quality when carrying out Microsoft training. To Microsoft, tracking customer satisfaction and quality of the third party vendors is critical. In addition, training is a key indicator of product and end customer business intelligence. The need for accurate and timely knowledge of the products being trained upon and the organizations taking the training can provide Microsoft with essential knowledge on product and customer demand. Microsoft is adding to its base of performance measurement by tracking a balanced scorecard of all five levels of learning, including ROI. This will help the organization pinpoint how the software and the related training are impacting people on the job, how training ties to organizational business results, and if the training was a positive investment for the end customer.

Measurement Approach: The measurement approach was complex and had been attempted before by Microsoft in the past but due to logistical, cultural and technical challenges had not been successful. Then, in 2001, Microsoft and KnowledgeAdvisors teamed up to attempt to measure in a consistent, real-time, and on-line manner, the training performance of every participant taking Microsoft training from all certified vendors. Microsoft utilized the power of KnowledgeAdvisors Metrics that Matter™ system to do this. Metrics that Matter™ is able to present the right survey, at the right time, to the right participant thousands of times per day to collect, process and report the results of hundreds of training events around the world instantaneously. Use of Metrics that Matter™ saves Microsoft significant financial, physical and human resources that would otherwise be expended managing such a large and complex undertaking in the absence of Metrics that Matter™. Participants are surveyed at the end of training and when they are back on the job. The current program captures additional business intelligence on key metrics surrounding learning effectiveness, job impact, business results, ROI, and product and marketing information.

Measurement Obstacles: Unlike a corporation that controls its destiny as it produces and delivers the training, Microsoft had hundreds of independent learning providers that deliver the training on its behalf. A major challenge was convincing the learning providers to use a tool like Metrics that Matter™ and to be measured and benchmarked against each other. This was overcome because a value-added feature of Metrics that Matter™ is in its ability to automatically provide over 100 reports online to each individual learning provider, to all of its locations, and to all of its instructors. In this way, the learning providers received value from the process in a tool that helped them manage their business better and prove value to their end clients as well.

Measurement Successes: To date, millions of data points on hundreds of thousands of evaluations have been collected for Microsoft Training using Metrics that Matter™. Microsoft has access to information that ranks each Certified vendor in terms of several indicators of performance. In addition, Microsoft generates ROI information that can be analyzed in a real-time manner. Information regarding job impact, business impact, and a financial return on investment are reviewed by Microsoft on a monthly basis and can be sliced and diced by program, curricula, course, location, learning provider, client, learning delivery etc.

Based on the success with the CPLS program, Microsoft has now rolled out Metrics that Matter™ with their Partner Program and other learning operations within their organization.

CNA Insurance Taps the Power of Metrics that Matter for Its Leadership Development Program

Company Overview: CNA is a global insurance organization serving businesses and individuals with a broad range of insurance products and insurance-related services.

Description of Learning Program: CNA implemented a comprehensive Leadership Development Program. The program was organized into two distinct curricula: Business Leadership and Personal Leadership. The overall goals of the programs were to cultivate high performers within CNA by providing them the tools and support they needed to grow as leaders within the organization.

Business Objectives of the Program: The Business Leadership Program was aimed at changing the participant's ability to coach and support employees; develop and maintain internal and external business partnerships; produce high-quality solutions to business challenges; and build and manage a reputation for success. The Personal Leadership Program was aimed at helping participants acquire the skills needed to assist others in problem solving, risk taking, decision-making and tackling challenges.

Measurement Approach: The measurement approach was multi-faceted. CNA deployed diagnostic tools within the training to help assess leadership issues (the Leadership Development Inventory); job aides and coaching sessions to help reinforce learning; using the learning on the job such as in creating accountability plans to apply learning; and reviewing constructive changes made as a result of the program to determine if the program fulfilled the business objective of creating better leaders.

In addition to the above, CNA and KnowledgeAdvisors collaborated to create formal Metrics that Matter™ data collection instruments that were and continue to be deployed throughout the major milestones of the program. These instruments link questions to the levels of learning measurement and help CNA make changes to the program in a timely manner while providing feedback to management on how the program is progressing. Once all of the milestones have concluded, CNA will conduct another data collection exercise after the participants have had time to apply what they have learned to the job. At that time CNA will also be surveying the participants' managers to gather additional feedback on how the learning program has impacted the job and made the participant a stronger leader.

Measurement Obstacles: Like any measurement approach, CNA must be sensitive to how it measures learning. Cost and time constraints are factors that prevent CNA from investing significant resources in the process. However, CNA has embedded check points into the learning process via coaching, discussion sessions, and the surveys conducted at the conclusion of milestones. This helps CNA reach a comfortable level of reasonable assurance with regard to whether or not the program is helping make participants better leaders.

Measurement Successes: To date, CNA participants in the Leadership Program have provided valuable feedback about the process. Their insight into the various tools used during the program has helped the learning and development group make changes over time. In addition, the indicators around learning effectiveness, job impact, and leadership effectiveness have helped CNA understand the impact their investment is having on the organization.

Since the measurement of the leadership program, CNA has rolled out Metrics that Matter™ for all training. In this manner, CNA has a scaleable and replicable solution to enterprise-wide learning measurement and analytics.

Dell Measures Its Customer Training with Metrics that Matter™

Company Overview: Dell Inc., designs, develops, manufactures, markets, services and supports a range of computer systems, including enterprise systems (servers, storage and networking products and workstations), notebook computer systems, desktop computer systems and software and peripherals. The Company also offers a portfolio of services that help maximize information technology (IT), rapidly deploy systems and educate IT professionals and consumers. In addition, Dell offers various financing alternatives, asset management services and other customer financial services for its business and consumer customers in the United States through Dell Financial Services L.P., a joint venture between Dell and CIT Group, Inc. The Company is generally managed on a geographic basis: the Americas, Europe and Asia Pacific-Japan.

Description of Learning Program: Dell provides value-added training to assist its customers in optimally using the products and services they purchase from Dell. Customers ranging from corporations to individuals can access a comprehensive listing of course titles from which they can learn the best practices and supporting tactics to help them get the very most out of their new Dell purchase. Training from Dell's perspective is an essential part of the customer experience.

Measurement Approach: Dell requested a scalable and flexible approach to measure the investments they make in learning programs. They wanted to ensure the approach encompassed sound learning methodologies while being practical to use in the real world. Dell worked with their training partners including Netg, an eLearning content provider, GeoLearning, a learning management system, and KnowledgeAdvisors to create a seamless, integrated, customer facing interface where all systems work together to register participants for the training, present the training, and measure the training. The measurement solution is a Dell branded interface that seamlessly directs respondents to Metrics that Matter™ to complete their learning evaluation. Once all the data is collected, it is stored, processed and reported in the reporting interface of Metrics that Matter™. From this powerful site, Dell can access real-time metrics covering key performance indicators on learner satisfaction with training, knowledge and skill transfer per course, training impact on the job, training impact on business results, and a hard and soft ROI metric. Further, these indicators can be filtered in multiple ways including learning vendor, location, client name, learning modality, course, class, curricula, and program.

Measurement Obstacles: No significant challenges were experienced. Integration and working through details with learning vendors was challenging but through appropriate project management and solid teamwork that challenge was easily overcome to create the integrated solution on time and on budget.

Measurement Successes: A nice feature for Dell is the simplicity and seamless ness of the solution from a customer facing perspective. As a market leader, Dell was highly focused on the customer viewpoint. Not only can the customer provide a host of feedback on all Dell learning events, they can do so in a manner that is unobtrusive to the learning itself.

The value for Dell is the real-time access to business intelligence to help them 1) monitor their learning day to day for quality and customer satisfaction, 2) use the metrics proactively for continuous improvement purposes, and 3) use advanced indicators such as job impact, business results and ROI to showcase the overall value of learning when purchasing Dell products.

New Horizons Rotterdam Center Leverages Metrics that Matter™ (MTM) to Validate Knowledge and Skills with Strategic Clients

Company Overview: New Horizons is the world's largest independent IT training company worldwide. The New Horizons Rotterdam center started in 1999 with 2 classrooms and 6 employees. Today they have quadrupled in size by using innovative tools and working hard to deliver high quality training that returns significant on the job value to customers.

Description of Learning Programs: New Horizons Rotterdam provides both application and technical training to over 12,000 students annually.

Business Case for Using MTM: In the beginning, the goal was to streamline the evaluation process for trainers and courses. What was once done manually, taking significant time on a daily basis, is now just a single mouse click to get insightful information on the performance of products and services. Not only has MTM streamlined the evaluation process, it created unique opportunities to show clients direct results of quality and learning impact. This is a very convincing and credible element to the evaluation process and the customer relationship. In today's economy customers are asked to do more with less and justify the choices they have made. Ultimately, MTM helps the end customer measure their investment and manage constrained resources appropriately.

MTM Success: There are several applications of MTM in the center. First, MTM is used in the pre-sales process. Measurement is stressed as a valued feature of the training solution. New Horizons Rotterdam reviews measurements and goals with the prospect and points out the importance of measurement to the success of the training. Then, once training occurs the actual measures can be reviewed against the goals set up during the pre-sales process.

On a more tactical level, MTM is used to report trainer performance on a daily basis. This helps improve the quality of training offerings through real-time, comparable metrics. The Account Executives (AE's) review evaluations, class summaries, and client aggregate reports as critical tools in their account management process. Client reports are excellent job aides to use as pre-sales tools to differentiate the center from others. The approach is to let clients know that if you cannot measure your learning investments you cannot manage them appropriately and we help provide that service through MTM. Leveraging these measurement tools is an ideal way to build life long relationships with customers and let the client know we have a vested interest in their learning solutions.

Future Plans for MTM: MTM has changed the way we do business. Building and maintaining relationships grounded in value is a goal of our learning organization. The MTM tools allow our organization to back up our value proposition and marketing and communication messages with real, quantitative results. It will be a key differentiator. In the next annual budget, we anticipate more new business driven by MTM whereby 1) it was the difference in winning the training contract and 2) it is another service we can resell to our customers who want direct access to the data online.

Nebraska Public Power Leverages a Metrics that Matter™ Pilot Program to Plan and Budget for Learning Measurement

Company Overview: Nebraska Public Power District (NPPD) is Nebraska's largest electric utility, with a chartered territory including all or parts of 91 of Nebraska's 93 counties. It was formed on Jan. 1, 1970, when three utilities--Consumers Public Power District, the Platte Valley Public Power and Irrigation District and the Nebraska Public Power System--merged. NPPD is a public corporation and political subdivision of the state of Nebraska. The utility is governed by an 11-member Board of Directors, who are popularly elected from NPPD's chartered territory.

Description of Learning Program: NPPD offers a variety of training programs to meet the organizational development needs of its employees. As a part of NPPD's commitment to learning, the need to understand the effects of the learning on the employees and the organization is of paramount interest.

Measurement Approach: NPPD received a special offer brought to them by KnowledgeAdvisors to pilot test the Metrics that Matter™ learning measurement system for a three-month period. The pilot was with absolutely no financial obligation to NPPD. The rules were simple, Metrics that Matter™ will show its value and result in a 12 month agreement to use it within NPPD or it would not and NPPD could walk away from the pilot without a single penny allocated toward the exercise.

In the minds of NPPD learning professionals, the pilot was really a proof of concept. To NPPD, the pilot would permit the organization to really use the tool day in and day out for three solid months to understand the administrative and reporting elements of the system. More importantly it would allow NPPD to understand if learning measurement would be perceived as a valuable exercise to NPPD management and executives, resulting in the provision for it to be included in the budget proceeding the pilot.

For three months, NPPD used Metrics that Matter on a daily basis. An account was setup specifically for NPPD and personnel were trained on the use of the system. At the end of the pilot, over 255 participants had accessed and completed KnowledgeAdvisors data collection instruments at various points in time in the learning process. Over twenty different events in over a dozen course offerings were measured using the tool. On a daily basis, instructors could see their results, management could view aggregate data, course designers could access customer feedback and training managers were alerted to classes that did not meet expectations. At the end of the pilot NPPD was able to run a comprehensive ROI scorecard showcasing a balanced set of measurement indicators, including a financial ROI. In addition, they were able to compare their training to a benchmark database of several thousand other users of Metrics that Matter™ as an external point of reference.

Measurement Obstacles: The main obstacle was the initial commitment to proceed with a pilot. Although there is no financial obligation, NPPD felt resources would be needed to implement the system. Surprisingly, an account was created within a week of agreeing to do the pilot and only a few hours of NPPD time was needed in that process.

Measurement Successes: NPPD was able to take advantage of the pilot to really 'kick the tires' before they invested in the learning measurement solution. An important by product was that it gave NPPD learning professionals solid, quantitative evidence that a tool like Metrics that Matter™ could be used on a continuous basis to produce credible business intelligence to provide to their stakeholders. In addition, learning professionals were able to see first hand how technology could really be leveraged to automate a highly manual and labor-intensive process. Once the concept had been proven, the budgeting process and approval for an annual subscription to Metrics that Matter™ was made easier. NPPD is now a regular user of the Metrics that Matter™ technology.

PeopleSoft University Focuses on Monitoring by Measurement

Company Overview: PeopleSoft is a leading provider of enterprise applications that tie together customers' back-office operations. Its software addresses such tasks as accounting, human resources, manufacturing, and supply chain management. The company also offers services such as consulting, maintenance, support, and training.

Description of Learning Program: PeopleSoft University trains a wide variety of PeopleSoft employees on everything from finance skills to product skills. PeopleSoft has thousands of course offerings and trains its workforce using a variety of delivery modes.

Business Objectives of the Program: PeopleSoft University is dedicated to providing learning solutions to its employees. As a leading technology company, it is very important to ensure that employees have adequate learning and development opportunities and feel supported in their job. PeopleSoft University ensures this objective is met.

Measurement Approach: The measurement approach was tackled using a learner-based approach to measurement. Given that PeopleSoft University is extremely busy limited time and resources could be expended on measurement. The approach was to use KnowledgeAdvisors Metrics that Matter™ to measure the training for the University. A customized Post Event and Follow Up survey were created and deployed. The data collection instruments are aimed at providing predictive indicators and estimates across all 5 levels of learning measurement. PeopleSoft administers the system by scheduling classes and data is collected each time an event occurs. On a regular basis, members of the PeopleSoft team review tactical information such as class evaluation summaries and participant comments to ensure day-to-day activities are of high quality. On a monthly basis PeopleSoft University reviews the month's data across the five levels of learning measurement, including computation of a benefit to cost ratio as an indicator of ROI. Certain results are shared with business unit management and are included in a scorecard that goes to management.

Measurement Obstacles: Rolling out a measurement approach in a complex and large learning environment can be challenging. The major obstacles include how much of the University's curriculum is measured at the onset. At first PeopleSoft University measured standard traditional training and quickly has begun to ramp up to several eLearning offerings. Additionally, finding the right ROI approach can be challenging. Picking an approach that fits the organization but is efficient to calculate and reasonable in methodology is critical. Finally, buy-in from others within and outside the University is essential. Appropriate communication strategies can help create support for making learning more visible through the measurements.

Measurement Successes: To date, PeopleSoft has successfully rolled out Metrics that Matter™. The implementation process was efficient and effective. PeopleSoft is able to monitor its learning events in a real-time manner while providing key stakeholders periodic measures of its performance. The external benchmarks help the University stay motivated by providing external examples of how other learning organizations perform relative to the 5 levels of learning. On a quarterly basis PeopleSoft is able to leverage the business intelligence within Metrics that Matter™ to provide a comprehensive score card of metrics to each line of business. This scorecard creates a healthy and proactive dialogue regarding satisfaction, learning effectiveness, job impact, business impact and ROI.

PeopleSoft also leverages Metrics that Matter™ for its external training events through its PeopleSoft Education team. Customers who buy PeopleSoft software and undergo training on it, are measured and evaluated via Metrics that Matter™. As a result, PeopleSoft is able to provide metrics to the client on how the training impacted the software utilization and ultimately business results.

PeopleSoft Education Connects Customer Training to Business Results

Company Overview: PeopleSoft is the world's second largest provider of enterprise application software with 12,100 customers in more than 25 industries and 150 countries.

Description of Learning Program: PeopleSoft Education is the tenth largest IT training provider in the world. They offer tailored learning solutions to help their customers optimize the value they receive from PeopleSoft software.

Business Objectives of the Program: PeopleSoft Education deploys a four step model to embed training into a software implementation. The organization will meet with each client to define their education strategy and create a learning plan to coincide with the software purchase or upgrade. Next, an education business case is built to help the customer clearly articulate the need for training to decision makers and stakeholders. PeopleSoft Education will then work with the client to deploy the education plan by executing training in a variety of convenient formats. The fourth and final step is the measurement exercise described below.

Measurement Approach: PeopleSoft Education takes a cohesive partnering approach with each customer when it comes to measurement. Up front during the creation of the learning plan and building of the business case, PeopleSoft will work with each client to define the metrics that the client desires to see impact against from the software deployment and further, how the training might assist the client in improving the metric. Metrics may include increased productivity, increased quality, decreased cost, or decreased cycle time for example. Leveraging KnowledgeAdvisors Metrics that Matter system, PeopleSoft then deploys a series of data collection instruments administered immediately after training and 2 months later when trainees are back on the job. During both time frames, PeopleSoft Education gathers data to analyze the predicted and actual affects of the training on the business results. Their approach using industry accepted methodologies of Dr. Jack Phillips and Dr. Donald Kirkpatrick measuring a balanced scorecard of metrics about the training and estimating, isolating and adjusting impact data to appropriately and conservatively link training to the clients' business results. This approach allows PeopleSoft Education to objectively quantify how the training helped the client optimize the use of their technology to positively impact business results.

Measurement Obstacles: Like any change, this embedded approach to training and measurement was not achieved without appropriate communications and teamwork. The data instruments are not 'smile sheet' evaluations but require the participants to really think through the business results. Further, PeopleSoft instructors and account managers had to be educated on the benefits and importance of linking training to business results. These challenges were overcome through solid top management support as well as clear and articulate communications and training. The biggest champion for this measurement approach came in the form of the data itself. By retrieving data by client or in aggregate and understanding the quantifiable effects training was making on the job was the clearest and most convincing argument to remove obstacles.

Measurement Successes: In the first six months PeopleSoft Education collected over 13,000 data instruments. Over 700 clients went through the business linkage process. A key metric that surfaced is that PeopleSoft Education is found to have increased productivity by 20%. This number is isolated to training (as opposed to other factors) and is based on data gathered when participants are back on the job for at least 2 months. Quality was also found to have increased by nearly 20%. Organizations receiving the training also saw a cost decrease of 13% and a decrease in cycle time by 17% due to the training. In addition to these business results, PeopleSoft Education is able to monitor training quality (instructor performance, courseware quality, facility conduciveness to learning) and assess effectiveness of knowledge transfer.

Exelon Leverages Metrics that Matter™ to Evaluate and Test Thousands of Employees

Company Overview: Exelon, through its subsidiaries, operates in three business segments: Energy Delivery, Generation, and Enterprises. Exelon employs nearly 25,000 people and is headquartered in Chicago, Illinois.

Description of Learning Program: Exelon made a strategic investment in a new Enterprise Resource Planning (ERP) system. As a result, a significant training initiative occurred to orient thousands of employees on this system.

Business Objectives of the Program: The training program was designed to not only orient the employees on the features and benefits of the system, but mitigate risk of improperly using the system. Training was designed to accomplish both objectives.

Measurement Approach: Exelon worked with KnowledgeAdvisors to leverage Metrics that Matter™ to accomplish several steps necessary in achieving the learning and business objectives of this high profile program. First, due to the volume of participants the solution needed to be done in the most automated manner. Metrics that Matter™ automated the data collection, processing, storage, and reporting of evaluation and test results—saving Exelon literally hundreds of hours of time and thousands of dollars in costs.

Second, Exelon needed feedback in a very rapid turnaround time as these training events were occurring all over the U.S. in compact schedules. Metrics that Matter™ provided feedback that was instantaneous to instructors and training managers allowing the teams to make adjustments to improve the quality of the training prior to it being rolled out again, sometimes the following day!

Third, Exelon needed a way to monitor the quality of its instructors, locations, and varying courses. Metrics that Matter™ automatically aggregated the data from multiple events allowing Exelon to quickly view their top and bottom instructors, courses and locations.

Fourth, it was critical to Exelon to ensure the participants were prepared to use the new system. To do this, two tests were designed and integrated into the end of class evaluations. Metrics that Matter™ was used to conduct both the evaluation and the test. Metrics that Matter™ instantaneously scored each participants test and provided Exelon a real-time listing of who passed and who did not. Exelon was able to use this information to provide a system log-in ID to those who passed and help those who did not understand the system better prior to their receipt of a system log-in ID.

Measurement Obstacles: No significant challenges were experienced. Perceived challenges such as improper testing was mitigated by Metrics that Matter™ randomizing test questions. Response rates, once perceived a challenge, were mitigated by Metrics that Matter™ being easily accessible in the classroom. Response rates have been at or near 100%.

Measurement Successes: Multiple benefits were realized by using Metrics that Matter™. Significant cost and time was saved through the automation of both the evaluation process and test process. Real-time reporting ensured continuous improvement and the preservation of high quality. Testing accomplished the business objective of mitigating risk that employees lacking sufficient knowledge and skills would access the system. Aggregations of the data allowed the training group to benchmark instructors, locations, and courses to motivate by example. Overall, Metrics that Matter™ has been a positive return on investment for Exelon.

Eaton Corporation's Comprehensive, Automated Approach to Learning Analytics

Company Overview: Eaton Corporation is an international manufacturer. Eaton University is responsible for the training and development needs of thousands of employees.

Description of Learning Program: Eaton Corporation operates a diverse corporate university training its employees on a variety of subjects. The University deploys a combination of web-based/self-paced training and traditional training and utilizes in-house as well as external training providers to offer the best solutions to its employees.

Business Objectives of the Program: Eaton University is the centralized employee development entity within Eaton Corporation. The University is the primary provider of learning and development programs and initiatives. Eaton University is the thought leader within Eaton deploying the most innovative and timely learning services to Eaton employees to help improve job performance and productivity.

Measurement Approach: Eaton University initiated a completely automated, scaleable, and replicable solution to measure their learning investments. Metrics that Matter™ is fully integrated with Eaton's learning management system. Because of this integration, Eaton spends no time administering Metrics that Matter™. Instead data collection is seamless and completely automated. Data collection instruments are sent to learners at two points in time and sent to participant managers when the participant is back on the job. All the data collected through these instruments is then automatically stored, processed and reported. Eaton University is then able to logon to a website and pull information that can be aggregated and filtered. On a monthly basis Eaton receives custom reports that provide additional detail to manage its business. On a quarterly basis Eaton runs a score card that provides over 30 key performance indicators covering satisfaction, learning effectiveness, job impact, business impact, and quantitative ROI. This score card is run using various learning methodologies so that senior management can understand the impact of learning on the organization.

Measurement Obstacles: Integration between systems required appropriate and detailed project management to implement on schedule. The integration was done on time and on budget. This was attributable to appropriate teamwork from Eaton University, KnowledgeAdvisors, and the learning management system integrator. Appropriate communication to the stakeholders on a comprehensive strategy was also challenging. However, Eaton University planned and executed on many programs to market and communicate the measurement strategy to everyone that would be affected by the process.

Measurement Successes: Since implementing Metrics that Matter™ Eaton University has been able to monitor all of their training investments in a seamless and automated manner. The administrative time saved in the measurement process is significant. The standardized reports and easy to use online system permit users looking to glean metrics on learning with a solution that is efficient and effective to use. A very bright spot with the success of the tool is that the decentralized learning units at various manufacturing locations were able to see the value of the measurement solution that Eaton University implemented and are now rolling out their own versions of the tool for the training they conduct at the local sites.

A final success is that Eaton was awarded the Corporate University Best In Class Award for Best Evaluation Technique. This award is given by a panel of measurement experts and is recognized as the most prestigious award for measurement in the industry. They attributed their winning this award to the use of Metrics that Matter and its ability to help them scale to the right measures of value and continuous improvement.

Roosevelt University Evaluates its Fully Online Program with Metrics that Matter™

Organization Overview: Roosevelt University is a metropolitan, private university committed to student success, academic quality, and social justice, with campuses in Chicago and Schaumburg, Illinois.

Description of Learning Program: Roosevelt University offers a wide variety of undergraduate, masters, and doctoral programs. Schools within Roosevelt University include: Arts and Sciences, Walter E. Heller College of Business Administration, Education, Evelyn T. Stone University College, and The Chicago College of Performing Arts. RU Online, Roosevelt University's fully online learning program, delivers certificates, degrees, and individual courses to students in the Chicagoland area as well as across the country.

Measurement Approach: Prior to implementing Metrics that Matter™ Roosevelt University's RU Online Program had begun to use a web-based surveying tool to survey students and faculty at the mid point and at the end of the semester. While the tool was easy to administer, the reporting capabilities were limited, requiring RU Online staff to conduct extensive offline analysis to view the data in the manner they required.

Roosevelt University's RU Online Program engaged KnowledgeAdvisors for a pilot of the Metrics that Matter™ system. Several reasons for choosing KnowledgeAdvisors existed including the following:

- ❖ Tap into learning measurement experts to review and improve existing evaluation tools
- ❖ Leverage more specific learning measurement software to streamline the data collection function
- ❖ Exploit the reports that accompany the Metrics that Matter™ system to streamline offline reporting and analysis
- ❖ Provide a more timely self-service internet model to allow key stakeholders (administration and faculty) to view tabulated and aggregated results quickly
- ❖ Place into practice a more practical, scaleable, and replicable solution for ongoing student and faculty evaluation processes

KnowledgeAdvisors experts worked with RU Online staff to edit existing instruments. KnowledgeAdvisors then setup a Metrics that Matter™ account for Roosevelt that included all of the fully online courses the University wanted to measure during the pilot. Data was then collected via the Internet at the mid point of a term and then again at the end of the term also picking up data from the faculty. The data was then stored, processed, and reported in Metrics that Matter™ in a real-time manner and accessible to administration and faculty with account access.

Measurement Obstacles: Proving the value of Metrics that Matter™ over the existing online process was a challenge. However, the pilot program was an essential partnership between Roosevelt and KnowledgeAdvisors to prove the concept and value. The pilot clearly demonstrated value even after the mid-term data was collected and the RU Online staff and faculty could immediately see aggregated results and qualitative comments.

Measurement Successes: As a result of a healthy collaboration between Roosevelt University and KnowledgeAdvisors, the pilot program has proven to be a valuable exercise that demonstrated the impact learning measurement software can have in an academic environment.

RU Online administrators can search the system to find the top and bottom courses, curricula and programs in easy-to-view drill down reports. They can quickly determine the rank order of faculty based on student evaluation responses, and they can analyze faculty feedback specific to each course to make changes for future courses. Roosevelt also has access to a benchmark database with over 46 million data points to compare its offerings to others who use Metrics that Matter™. Future plans for Metrics that Matter™ include expanding the use of it beyond the pilot programs and continuing to improve their services and demonstrate value resulting from the measurements. This is made possible because less time is now spent deriving the measures so more time can be spent analyzing information and taking action based on the measures.

Showing Value is Critical to Grant Thornton Learning Strategy

Company Overview: Grant Thornton is the world's leading accounting, tax and business advisory organization dedicated to mid-size companies. Grant Thornton has 48 offices and over 3,000 partners and employees throughout the United States.

Description of Learning Strategy: Grant Thornton's learning vision and strategy has five unique themes. First, Grant Thornton University (GTU) leverages multiple-delivery channels to train the workforce in a real-time, convenient and cost-effective manner. Secondly, the design and development team strives to create compelling content that educates in a memorable way. Thirdly, Grant Thornton is focused on creating a continuous learning culture that embeds knowledge sharing and learning into the Firm's core fabric. Fourthly, GTU's strategy calls for proactively showing the value of learning to its stakeholders, focusing on effectiveness, impact and ROI. Finally, GTU focuses on strategic impact ensuring that learning and measurement are linked to business strategy.

Business Objectives of the Strategy: The Grant Thornton learning vision and strategy aims to create a strong and cohesive link to the lines of business that support and fund the training. A keen understanding of stakeholders and their business needs drives GTU processes day to day. The strategy reaches broadly across multiple stakeholders from senior management to staff accountants to recruiters. Having a well-articulated learning strategy helps differentiate Grant Thornton and enables it to attract world-class talent and assure professional excellence in client services.

Measurement Approach: GTU began using Metrics that Matter (MTM) as a pilot. It was used to measure several types of training such as virtual classrooms, face-to-face conferences, and on-demand web-based learning. Using a balanced scorecard of key performance indicators, GTU collected data at the end of training that evaluated reactions and forecasted effectiveness, impact, results and ROI. In one case, Grant Thornton used MTM to evaluate the ROI on a New Managers Development Conference. The quantified results tabulated using the MTM system clearly showed a positive return on investment, reinforcing the program's contribution to business results.

Measurement Obstacles: Prior to full integration of MTM with the learning management system, the evaluation process involved a large amount of administration. With the integration, administration has been reduced dramatically. MTM saves time by automatically collecting, storing, processing and reporting the data that previously was done manually.

Measurement Successes: In the first year since implementation, MTM has been used to process evaluations from over 2600 participants in live webcasts and over 600 participants in GTU conferences and classroom programs. Over 70 programs from tax, assurance, industry and Firmwide segments have been evaluated. GTU uses the system to monitor the performance of learning programs on a regular basis. The measurements have helped showcase the value of learning programs to stakeholders. MTM also helps ensure GTU continues to stay on the leading-edge of delivering high quality, innovative and impactful learning solutions to its workforce. The next evolution for GTU will involve measuring the effectiveness of a new Leadership program and working with the finance group to continue to develop financial metrics tied to learning.

Nextel Communications, Inc. Measures Impact and ROI with Metrics that Matter™

Company Overview: Nextel Communications, a FORTUNE 200 company based in Reston, Va., is a leading provider of fully integrated wireless communications services and has built the largest guaranteed all-digital wireless network in the country covering thousands of communities across the United States. Today, 95 percent of FORTUNE 500® companies are Nextel customers.

Description of Learning Program: Nextel has a very diverse set of training programs distinguished by several separate learning institutes: management, customer support, customer education, sales, leadership and technology. Each institute has its own team of instructors and curricula. Nextel also delivers training using a blended approach combining traditional classroom, web-based and online facilitated training.

Measurement Approach: Nextel has a rigorous approach to measure a balanced scorecard of learning metrics such as satisfaction, effectiveness, job impact, linkage to business results and return on investment (ROI). For all training Nextel deploys a practical, scaleable and repeatable solution, via Metrics that Matter. Nextel uses a post-event evaluation to gather predictors of job impact and business results. A few months later, participants receive a follow-up evaluation to “true up” the forecast and provide data related to the actual job impact, business results and ROI.

Nextel learners are able to complete this survey very easily taking the same time as a previous smile sheet. However, the learning organization receives richer data to make business decisions for future resource allocations. Furthermore, this data is automatically collected, stored, processed and reported so Nextel has little administrative work and can focus on using the metrics for decision-making purposes.

Measurement Obstacles: Nextel was certified in the Phillips ROI Process and had previously done in-depth impact studies. The ability to automate this process and have it scaleable to all training is a significant benefit of Metrics that Matter.

Change management was addressed by getting buy-in from stakeholders during the process. Stakeholders were included in the evaluation questions, the reporting process and the ROI methodology.

Measurement Successes: Since implementing Metrics that Matter, Nextel has been able to measure its training through the impact and ROI level for all training initiatives. Some key areas that were measured include the following:

- Satisfaction with Nextel instructors in the classroom.
- Improvement in skill or knowledge from training.
- Training was directly applied to the job within the first six weeks after training.
- Experiencing significant gains in productivity and quality on the job attributable to the training.

The metrics have allowed Nextel's learning team to tangibly and quantitatively show the value to its stakeholders.

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