Most managers and executives in training/learning organizations get asked monthly or quarterly about their “dashboard.” Some people call it metrics, numbers, reports, or something else specific to their view of your world. Whatever it is called, it is how you are viewed and discussed at the highest levels of your company, however rarely.

After a few of these quarterly queries, we all begin to realize that we probably don’t have the right metrics for whoever is asking. And if by some strange coincidence we do have the numbers they want, it’s not in the right format, or more likely, the right level of detail. Some of that we can fix, some is so idiosyncratic that we shouldn’t.

So we start to wonder whether or not we should have a separate report for each inquisitor, specific to his or her job function or their area of accountability. That sounds ludicrous to us and sensible to each of them, so do not propose it and do not entertain it if any of them suggest it.

What are the elements of a good dashboard? Let’s get the easy answer out of the way: Every company is different so there is not a universal answer to that question. OK, maybe we can think about it without answering it?

First, break your dashboard into two separate pieces: internal to the training group, and impact on the enterprise (or operations versus results). The metrics that inform a training group about its process, efficiency, quality, utilization rates, seats, units sold/delivered, etc. don’t mean much to the enter-
prise. Your CEO and executive team don’t really care about how long it takes to create a module or exercise. They do care passionately about your results and your impact on the enterprise. So separate your data and reporting into two dashboards.

### Operational Dashboard

The standard “busyness” metrics about courses developed, videos viewed, average viewing time, development cycle times, revenue per product, trainer platform time, etc., are terrific for operational analysis. But these are generally not enterprise business metrics. They are training business metrics. In and of themselves, they don’t really reflect the impact of what you do for or to the corporation, but how the training organization performs. For example, if your team delivered 20,000 hours of training to sales, partners and support staff, is that a good metric? Some CEO’s and executive teams see that as 10 labor years lost in one reporting period. (One employee works about 2,000 hours per year in the U.S. for salary/comp purposes.). That is a busy metric, not a result metric. The result metric would be about the impact of those hours on the enterprise goals. The hours delivered or viewed metric speaks to your capacity, efficiency, reach and visibility. That is way more important to you than to the enterprise leadership. This is the easy dashboard because this is what we’ve tracked and reported for years. It helps us manage our organization, our training business, and we can benchmark ourselves against other training groups because there are some standardized approaches, tracked by a number of industry experts and services.

The operational dashboard is where we decide what’s important to manage a great organization. It’s where we’re comfortable, and where other executives wander around questioning our value and impact because impact/results are not in these kinds of reports.

### Results or Impact Dashboard

This is where most of us leave our comfort zone — tracking, quantifying and reporting results, not activity. The first thing we usually do is fall back on is reporting revenues. It is easy, and is a point of common understanding among executives, but our training revenue is not usually relevant. No matter what our training revenues are, they are likely less (probably much less) than 2 percent of company revenues. That means, if it’s a choice between investing to double or triple training revenues, or increase product/service sales by 5 percent, they will choose sales every time (and should). So don’t use revenue as a primary metric. Instead, focus on what you do to increase sales/top line revenue, not your own. If you have to talk about training dollars, talk about contribution dollars (profit), but again, it’s so small by comparison to the rest of the company that we make ourselves look irrelevant when that is our primary identifying metric.

**What should you emphasize on the results dashboard?**

The easy answer is things that make you relevant, that enhance your value to the enterprise. Training is a tool to be applied to enterprise problems. Show the results.

Figure out those key points where you have or could make a positive impact. Identify where your activity improves the success of individual products, organizations, sales, or other enterprise goals, and highlight your audience partnerships.

Ask yourself and your team some questions and identify internal corporate sources of data outside the LMS you’ve deployed. Here are some examples:

- Can you show any relationship between city and regional sales results based on training consumed? This is not individual training; it’s large numbers and trend lines over short and long time periods. Start tracking this kind of data and you will find areas to report/demonstrate strengths and weaknesses to be shored up.

Managers may care about which of their people are trained, but executives care more about regional performance than individual performance. Focus on the large numbers and organizational trends, not the individuals or individual performance.

Globally, executives want to know about the results of specific types of training content in different geographies and the successes, or lack thereof, instead of having the “cultural differences” discussion without any dashboard evidence.

Several years ago, an organization I led (partnering with sales) was able to demonstrate that once 30 percent of the sales force was “trained” on a new product or technology, sales rocketed up and to the right. Whether that took two days, three weeks or six months, the ramp in volume proved to be linked to training 30 percent of the sales staff. No one could definitively explain it, but it was repeatable.

- Can you compare support center differences based on training consumed? What makes a difference: volume, timing of delivery, or kind of content (video, audio/slides, text, games, courses, live or self-paced seminars)?

- Is the training activity reducing calls to tech support? Or just Level 1 calls? Maybe not through courses, but by publishing the Top 10 calls/complaints and solutions prevents calls for customers every week or month.

- Can you reduce the time spent on calls by having better search of training and technical documentation? Sending the steps electronically, so following the technical advice is easier/faster?

- Is customer satisfaction increased if training is done differently? For example: media differences, timing, early adopter training available before launch. How many of your potential customers come to

training (classroom or other) before deciding whether or not to buy?

- Is there a link between customer or partner satisfaction and training consumed or certifications earned?

In another instance, our team demonstrated dramatically higher customer satisfaction and loyalty ratings from corporate survey responders who were certified versus noncertified in our technology. That may seem logical (it does), but proving it and showing how dramatically higher the scores were made budget discussions much easier for the next several years. It was proven through meticulous research between satisfaction respondents and the list of current and past certificate holders.

- Is there a regional difference in new hire success that is at all related to the variety of onboarding processes in different geographies? Do you know the average time before a new-hire sales person achieves their initial target?

At a different company, my team demonstrated that if you conducted sales onboarding after the first 30 days (with a mandatory pre-test to pass before registration) instead of the “first week,” and before six months in the job, new hires achieved sales goals three months to nine months sooner than other regions who did it differently. It doesn’t matter that the sales targets are different; they are supposed to be realistic for their location.

These kinds of questions and data do not always evidence cause and effect relationships. They are indicators of a functional relationship that has many variables. They do demonstrate significant points of impact and results that can identify your organization as a strategic partner in the success of the enterprise. These kinds of data points can take the pressure off of an operational metric (revenue) and create visibility around the value of a well-managed, strategically important enterprise asset: the training group.

Finally, after identifying your important results metrics you want to show, build collaboration partners (those groups impacted, finance, whomever) that will funnel data to you frequently and automatically. When you explain what you are trying to show, how it benefits them and the company, and that you will help shore up any areas of concern, most of them will join in (though maybe not enthusiastically at first).

Lacking that cooperation, you can still put up the incomplete data and explain to the executive team that with better internal teamwork, the data would be much improved and more actionable.

Your results dashboard should be all about the touch-points in the company where you and an audience group are collaborating to meet or over-achieve corporate goals.

These relationships, plus these kinds of metrics, identify you and your training organization as strategic partners in the enterprise as results-oriented impact players.

The operational dashboard speaks to how well you do your job. The results dashboard speaks to the real reasons to fund a training function, and can move your training organization from the classroom to the boardroom.

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Takeaways

- Create two dashboards — it’s actually easier than one
  - The operational dashboard helps manage the efficiency and operational excellence of the training organization.
  - The results dashboard demonstrates the impact of the training group on the enterprise.
  - The first is easy and familiar, looking inward at your group and your data.
- The second is harder and more complex because the data resides in other parts of the company, or outside at partner and customer sites.
- Results metrics should reflect impact on enterprise goals and initiatives; this will vary from company to company. Find area where you are or could have impact.
- Identifying the important metrics is a starting point. Then you have to create trusted relationships that provide data automatically. Not everyone wants to share.
- The data should be about large numbers and trend lines, not individuals.
- When, where and how content is accessed by the audience can lead to stunning changes in content creation and dramatic improvement in impact on enterprise goals/trajectory.
- Done well, these two dashboards can help quickly evolve training into a strategic partner in the enterprise and a respected participant in future planning.