

**Kirkpatrick and Phillips Evaluation
Models:
InfoPro Worldwide's Experience**



INFOPRO Worldwide Inc.

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1. Executive Summary

InfoPro Worldwide uses Donald Kirkpatrick's training evaluation model to evaluate the impact of trainings created for our clients as well as in-house trainings. In accordance with the four levels of evaluation suggested by Dr. Donald Kirkpatrick, we have created evaluation mechanisms that can be customized as per the client requirements and the type of training being evaluated.

The following two case studies provide an overview of how InfoPro Worldwide used the Kirkpatrick model and the evaluation results, which demonstrate the applicability of the model. The case studies highlight the key challenges that the teams faced in the implementation of the model, especially at the third and fourth levels.

2. Case Studies

1. eLearning Course on Customer Handling Skills

Overview:

The client has a large technical support staff across the globe to serve and resolve the customers' issues regarding the purchased hardware products. The course imparts customer-handling skills to the technicians with the help of examples and case scenarios to help learners achieve customer satisfaction. Additionally, the course covers the processes required to handle typical situations encountered during service calls. The course also introduces learners to the company's guidelines and procedures for handling difficult situations.

Audience:

The target audience is service technicians, i.e., support staff that are, typically, not the company's employees. These technicians belong to diverse cultures and different countries. The average technician is a high-school graduate and has only domain-specific knowledge.

High-level objectives of the training:

The company identified the overall purpose of the training as helping the service technicians:

- Improve their customer handling skills to achieve higher level of customer satisfaction.
- Resolve irate customer issues.
- Attend and resolve customer calls efficiently.
- Attain better productivity and quality results in their job.

Delivery of the training:

The training was delivered as an interactive eLearning program of approximately 2 hours duration. Before launching the eLearning program, each learner was required to take a mandatory pre-test based on the following key objectives/concepts expected to be covered in the training:

- Guidelines for achieving customer satisfaction
- Guidelines for managing customer expectations
- Key concepts related to "Moment of truth"
- Parameters used by their organization to evaluate service performance

- Steps in the call flow process
- Criteria used to evaluate service performance
- Company procedures for handling situations related to parts and scheduling errors
- Steps for handling difficult customer situations

Their scores on the pre-test were stored in the LMS.

Apart from giving the learners theoretical information on procedures to be followed for handling different types of service issues and the behaviors and attitudes required for superior customer handling, the training program was interspersed with several real-life scenarios and situations that helped learners relate it to their on-the-job problems. Some of the situations were in the form of interactive simulations that helped the learner practice the skills they were being taught. Additionally, quizzes built into the training program after each key module helped learners assess their understanding/learning and revisit lessons/topics on which they may not have achieved desired scores.

Being an eLearning program available over the Internet, learners had the flexibility to take it any time and at any location as per their convenience (provided they completed the entire program within a stipulated time).

After going through all the modules of the training, learners were required to take a post-test with questions similar to the pre-test. The performance in this test was also stored in the LMS.

Training evaluation process:

As per InfoPro Worldwide's agreement with the client, the effectiveness and measurable impact of the training program was supposed to be evaluated at the first 3 levels of the Kirkpatrick model: Reaction, Learning, and Behavior.

InfoPro Worldwide created evaluation tools and mechanisms for all the three levels in consultation with the key stakeholders of the client organization. These were the Training Director, the Regional customer service heads, and the line supervisors of the service technicians.

The following tools were agreed upon and used to conduct the evaluation:

Level 1

The reaction to the training was assessed through a questionnaire/training feedback form, which was completed by all trainees before exiting the training program. As per the requirement of Level 1, the purpose of this questionnaire was to assess the learners' perception of the training program. Accordingly, the questions in the form were designed to obtain the learners' feedback on the training content, design, interactivity, and delivery. The questions were a mix of multiple-choice and free-flow types.

Here are samples of some questions that were used in this form:

1. *How relevant was the training content to the customer handling challenges that you face in your service calls?*
 - Learners answered by selecting one of the following options – Very Relevant, Quite relevant, Somewhat relevant, or Not relevant at all.

2. *What can be added to / deleted from this program to make it more effective?*

- This was a free-flow question where a learner could give their opinion in detail.

Level 2

The learning obtained by the trainees was gauged by comparing their scores of the pre-tests and post-tests. InfoPro Worldwide's and our client's objective was to achieve at least 30% improvement in the average score across all trainees. The analysis of the pre- and post-test results stored in the database showed that the average-learner scores increased by approximately 33%.

A detailed analysis of these results was also carried out to see improvement in scores at module levels. Modules that showed a significantly less improvement than the average are now being re-assessed by the development team as well as stakeholders for flaws in teaching strategies and content depth and coverage. The results of this analysis (if also supported by results of the level 3 evaluation) may lead to creation of a short refresher course based on such modules.

Level 3

It has been decided that the level 3 evaluation of this training program should be done after a gap of at least 4 months of the launch of the training program so that the assessees who answer questions or share their observations about the learners' post-training performance get sufficient time to observe the learners' behavior and newly learned skills in the real-life environment.

InfoPro Worldwide has meanwhile proposed a two-pronged strategy for this level:

1. A 360 degree evaluation mechanism

- Every learner's on-the-job behavior and performance will be assessed by their peers and supervisors.
- To maintain the confidentiality of this evaluation exercise and minimize inter-personal biases that may creep in, this evaluation is proposed to be held through an online system into which each evaluator can log in and fill in their responses.
- The online system designed by InfoPro Worldwide provides different types of detailed and summary reports based on the responses.
- The target is to achieve an average score of 4 out of a maximum 5 on the demonstration of skills and attitudes learnt during the training.

Some questions that are being designed for the online evaluation system are:

	Not Really	To some extent	Quite a lot	Most definitely
Is there a noticeable and measurable change in the activity and performance of the trainee when back in their role?				
Have you observed the change in behavior and new level of knowledge				

sustained across multiple client interactions?				
Would the trainee be able to transfer their learning to another person?				
Is the trainee aware of their change in behavior, knowledge, or skill level?				

2. Comparison of scores on a Customer Satisfaction Survey (CSS)
 - This involves comparison of CSS forms that the company was already using.
 - The current scores on parameters that this training is supposed to impact averages to about 3.72 (out of a maximum of 5).
 - The post-training target (after collection of ample number of CSS forms in a period of about 6 months) is 4.2.

2. Case Study 2: ILT on Know What You Are Selling and Sales Methodology

Overview:

InfoPro Worldwide Learning's client, InfoPro Worldwide Worldwide UK (IPW) follows a franchising model for selling its Website development services in the SMB market segment. This training was created as two primary modules:

1. **Know What You are Selling**
 - a. To provide detailed knowledge of IPW's products and service, known as WebSolutionsPlus to the franchisees.
 - b. The in- depth product knowledge is related to features, benefits, packages, and pricing.
 - c. The training uses various examples and case studies to help the franchisee understand the product and service features and put forward a successful sales pitch.
2. **WebSolutionsPlus Sales Methodology**
 - a. To provide guidelines and strategies to fully understand the customer's needs and sell the WebSolutionsPlus service.
 - b. The training provides a structured approach to interact with the client and a strategy to take the client through every step of the sales cycle and thus move from a prospect / raw lead stage to a client using a consultative approach.
 - c. The training also helps franchisees understand and achieve what needs to be achieved at each step of the sales cycle.

Audience:

The target audience is franchisees, i.e., product or service sellers who have joined IPW's franchising network. The franchisees have a varied background, in terms of their selling experience, as well as their knowledge of Website services related terminology, jargon, and development tools and processes.

High-level objectives of the training:

The company identified the overall purpose of the training as helping the franchisees:

- ❖ Understand the products and services in depth
- ❖ Reduce their queries to the IPW team regarding basic product and service features, benefits, and pricing
- ❖ Capture client requirements accurately with minimum time investment and share the same with the IPW development team
- ❖ Demonstrate professionalism and preparedness when interacting with the client
- ❖ Get 'qualified leads' by following the process described in the training
- ❖ Explain the benefits of the service to clients accurately and help them identify suitable packages as per their requirements
- ❖ Help the client freeze their needs and accordingly present a solution that best meets the needs
- ❖ Get the client's agreement on execution details, such as time and a price by following negotiation strategies and close the deal

Delivery of the training:

The training was delivered as an Instructor-led program of approximately 5 days of duration. The client requirement was to create the training program in such a manner that it could be organized either in face-to-face classroom sessions or through remote telephonic sessions using live meeting software for the instructor to share their screen with all trainees on their respective computers. Therefore, a key challenge of this training was to maintain learner's interest and motivation and also ensure active participation of all learners when the training was being held remotely.

Training evaluation process:

It was decided that the effectiveness and impact of this training program would be evaluated at the 4 levels of the Kirkpatrick model: Reaction, Learning, Behavior, and Results.

InfoPro Worldwide created evaluation tools and mechanisms for all the four levels in consultation with key stakeholders of the client organization. These were the Master Country Licensees who are responsible for franchisee sales in each region, the IPW sales head; the IPW Account Managers, who are responsible for servicing the pre-sales needs of franchisees; and the IPW Delivery Managers, who are responsible for post-order client deliveries.

The following tools are being used to conduct the evaluation:

Level 1

The reaction to the training is assessed through a questionnaire / training feedback form which is sent to all trainees after completion of all sessions of the training. The purpose of this questionnaire was to assess the learners' perception of the training program in terms of content, design, interactivity, instructor's capabilities, and training infrastructure. The questions in the feedback form are a mix of multiple-choice and free-flow types.

A sample form being used for Level 1 evaluation is attached.



Training Feedback Form

Thank you for participating in the Induction Training. We would like your feedback to help improve our program.

Induction Training Name:
Date of Induction Session:
Franchisee Name:
Trainer's Name:

SCALE	
1	Below Average
2	Average
3	Good
4	Very Good
5	Excellent

Please rank the following parameters on a scale of 1-5

For the trainer	SCALE
Interaction with the participants (frequency and quality of interaction)	
Response to queries	
Pace of the session	
Adherence to training agenda	
Presentation skills	
For the training material	SCALE
Training material was aligned to the objective of the training	
Ease of understanding	
Flow, Structure, and Depth of coverage	
Relevance to market opportunities	
Quality of reference material provided	
For the Infrastructure	SCALE
Ease of access to Go to Meeting	
Clarity of voice during the session	

Your comments	
1. What new skills and/or knowledge have you gained from this session and how will it help you to achieve your goals?	
2. What can be added to / deleted from this program to make it more effective?	
3. Any other suggestion you would like to give?	

The analysis of all such completed questionnaires received so far has shown an average satisfaction level of 4.6 out of 5 against a target of 4.0, which demonstrates a high level of satisfaction with the training.

Additionally, comments received from trainees show that they found the training material and examples very relevant to their understanding of the on-the-job situations that are facing or are likely to face.

Level 2

The learning obtained by the trainees is assessed by the instructors based on:

- Daily quizzes
 - The instructor organizes these before the beginning of a session to test the learners grasp of the previous day's session
- Subjective homework assignments
 - These are given to trainees at least thrice during the training sessions.

- These assignments are submitted to the instructor by each trainee and individually marked.
- Based on the overall assessment of such assignments, the instructor discusses generic feedback with all participants in the sessions, while sharing specific feedback and scores at each trainee's level.

The target has been to achieve an average score of 7 (out of a maximum of 10) across the quizzes and assignments for franchisees undergoing the training for the first time as part of their induction into the IPW franchising role.

So far, IPW has conducted three batches of this training for new franchisees and achieved an average score of 7.2.

For franchisees who have already been working with IPW for a period of 4 to 6 months, this training is treated as a refresher. Therefore, the average score expectation is higher, i.e., 8 out of 10.

For the one batch of refresher training conducted for existing franchisees, the average has been 7.87 as against the target of 8.0.

Level 3

The level 3 evaluation of this training program is being done through an online Competency Assessment System wherein all stakeholders are required to assess the trainees on key competencies after at least 4 months of attending the training and being an active franchisee. The questions in the online system are based on key competencies of the trainees around their knowledge of IPW's products and service, and the behavioral competencies that they demonstrate during interactions with the stakeholders and stakeholders' observation of their interaction with customers.

So far, two batches of trainees have undergone this exercise and the average competency score has been reported as 4.2 (out of 5) on product knowledge related competencies and 4.1 (out of 5) on behavioral sales skills. Both these scores are against a target of 4.2 to 4.4.

In case of franchisees who took the training as a refresher, the competencies were assessed both before the training and 2 to 3 months after the training to gauge the improvement in scores across all competencies. The improvement expectation on average scores was minimum 25% whereas the actual results have shown an improvement of about 28%.

Level 4

To measure the impact of the training in terms of business results, it has been decided to focus upon the following key parameters related to sales performance:

- Percentage of leads being converted to RFQs
- Percentage of RFQs being converted to orders
- Average closure time for an order
- Average order value

The pre-training data for all these parameters is available with the IPW sales head in the CRM being used across all franchisees. The post-training impact on these parameters will be assessed

one year after completion of the first batch of the training, i.e., June 2008. However, so far the CRM reports show improvements ranging from 10% to 25% across the above parameters.