Learn, Apply, Network, and Measure

Micro-Learning Impacts

Case studies that describe how participants at *Training* magazine Events applied micro-learning ideas to produce measurable business results

	Learn	Apply	Network	Measure
	Step 1	Step 2	Step 3	Step 4
Conference and Learning Experience	Learn micro-ideas	Apply micro-learnings	Network with leaders, peers, friends	Show measurable results to leaders, peers, friends

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Micro-Learning Impacts : Summary of Results

Title	Participant Name	Goal	Outcomes	Training Payback	Date Published
An Efficient Way to Create Classes Using SMEs	Michele Schrotter	SME	$2,550.00	$510.00	Aug 01, 2007
Justifying Training Investment	Elle Callahan	Better communicate & measure the ROI of Training	$4,500.00	$1,350.00	Aug 01, 2007
Chunk content and shorten classroom training	Renee Smith	Help students learn better and faster	$27,000.00	$24,300.00	Aug 01, 2007
How Informal Learning Saves Money	April White Castañeda	Creating Informal Learning Opportunities	$4,000.00	$4,000.00	Aug 01, 2007
Enhanced Marketing Skills	Curt Valmy	Marketing Plan Adjustment	$3,600.00	$3,600.00	Aug 02, 2007
Training Impacts thru the Training Payback tool	Gary VanAntwerp	Training Payback Implementation	$1,800,000.00	$1,620,000.00 **	Aug 02, 2007

** In-house implementation

Micro-Learning Impacts : What Participants Say

"It was helpful in making me think about it, and showing that there is a return on invest- ment without going into too much complex details or problems on how I arrived at the measurement." - *Jeff Valentine, Training Manager, TJX Companies, Inc.*

"Being able to actually demonstrate value is a big win-win for the employee and the orga- nization." - *Renee Smith, Training Consultant, American Heart Association*

"It [has] helped me to focus on taking immediate action on my learning, rather than having it sit, and also to focus on what parts of the Conference I would take action on." - *Curt Valmy, Trainer, Development Consultant*

"By applying what I learned from the conference, it was possible to immediately improve systematically how I worked with SMEs." - *Michele Schrotter, Training Specialist, Bouchard Insurance*

"One of the expectations of my company in funding my trip to Training 2007 was goal- setting. The TrainingPayback® tool was a perfect resource to demonstrate my personal engagement in my professional development endeavors."- *Elle Callahan, Training Manager, cMarket*

"With the Social Networking functionality, I observed how learners planned to act on what they learned and provided them feedback." - *Gary VanAntwerp, VP of Training, NorthPoint Real Estate Investment Services*

"The Micro-Learning Impacts process and web-based tool have taught me to be more concrete and more conscientious about what I choose, why I choose, and how I'm going to bring that back [to my workplace]." - *April White-Castaneda, Training Manager, California Institute of Technology*

How to fill a huge gap in measuring training results

One of the huge gaps in the training function is our inability to demonstrate verifiable and measurable training results – oftentimes referred to as Level 4 of the Kirkpatrick Evaluation Model. We may often close our eyes and hope the problem goes away – but, results continue to matter.

Over the past year *Training* magazine Events and Training Payback® started a study on how to help participants apply micro-learning ideas on the job and show measurable training results. Initial findings reveal that aided by a new set of assumptions and Web-enabled solutions, participants are able to immediately apply a few key micro-learning ideas, implement their initiatives on the job, and obtain positive feedback from their leaders and peers. In addition, they added more value to their learning and successfully tracked financial returns as a result of their follow-through activities.

This report is part of a series of Micro-Learning Studies to determine feasible practices to improve learning and application, and measure training results.

Background of the study

Revisiting an age-old and major inefficiency in training

We had the opportunity to ask Bill Gross, CEO of *Idealabs* and former Board of Trustee Member at California Institute of Technology, a question: "How would you find opportunities to create substantial gains by using technologies?" His ready answer: "One does not have to be at the bleeding edge or invent killer applications. [One simply needs to] find a major inefficiency in the current processes and create a solution." This insight quickly points to a major problem in the training industry – difficulty, high cost, and slow capability to show financial proof of training results – the Micro-Learning Impacts.

Goal
To study and discover a method to help participants apply learning and measure training results.

Scope
Status: On-going
Participants: Participants *Training* magazine Events; 200 registered to participate; 40 agreed to join the in-depth study; 10 participants are in process of completing of the study; $200,000 the set as monetary goal.

Methods
Invitations and guides were sent to participants. A Web-based tool was used to capture and track goals . An initial interview was conducted with a questionnaire. Within a span of four weeks after the event, updated progress on monetary values was tracked – this is on-going.

We see a lot of hyperbole when training professionals talk about e-Learning, Web 2.0, Talent Management and Social Networking — and many claims of cutting-edge technologies — but we have yet to see a new way of measuring training results that is easy, verifiable, and provides rapid and instant feedback. We don't have a lot of solutions to this very old problem. Through this study, we are revisiting this major inefficiency, with the optimism that we may learn new insights.

NO to elaborate, overblown, statistical approach to Training ROI studies

We started with the study by asking a basic question, "How do we measure ROI (Return on Investment) in training? After reviewing current practices and literature, we observed that most ROI studies are costly, elaborate, and take months to conduct. This approach was not attractive to us.

We were looking for a faster, cheaper, and easier means of accomplishing our goal. Donald Kirkpatrick, father of the "Kirkpatrick Four Levels of Evaluation," suggested at the Training 2007 Conference in Orlando that "ROI studies tended to be long drawn and too focused on detailed statistics ... We need to make it simpler." It occurred to us that we were not looking for statistical studies. We wanted to understand specifically how participants from *Training* magazine Events — conferences and workshops — apply learning insights and show proof of results.

Definitions
Micro-Learning Impacts are qualitative, measurable, and verifiable outcomes of learning applications on the job!

Limitations
This study is a snapshot in motion rather than a static one. It is applied research focused on micro experiences which, we hope, may lead to a macro understanding of learning, application, and training measurements. It is not intended to create a body of data that will test a theory, but rather test an on-going evolving process.

Reporting
We envision that reporting one case at a time as we complete the study will encourage early response, questions, and more collaboration from training professionals.

The new question:

> "If we ask participants to identify *micro-learnings*, have them immediately apply the *micro-goals* at work, and provide them a Web-based tool to track the results and network with peers and leaders, will it add value to learning, and will this make it easier to show proof of financial returns?"

Our initial findings suggested a "Yes" to our question. Hence, this report aims to share with you our findings.

A different look at the DNA of measuring training results

In the earlier parts of the study, we experienced what John Seely Brown pointed out in *Social Life of Information (*2000): "People create tools, and tools recreate people." As we created the tools to achieve our goal, the tools helped us to refine our goal further, and the cycle continues. Hence, the study provided us a special opportunity to gain profound insights more than what we anticipated. We plan to continue this approach to our study, sharing discoveries as we report to you.

To achieve our goal and test our assumptions, we developed two sets of tools: (1) The Seven-Step Process and a questionnaire to gauge participants' activities, and (2) A Web-based tool to help participants capture and track real-time data and collaborate with leaders and peers.

Micro-Learning Impacts Process and Tool

Seven-Step Process	Web-Based Tool Features
1. *Learn* few key *micro-learning ideas* 2. *Apply* immediately on the job 3. *Set measurable micro-results* 4. *Network* with leaders, peers, friends 5. *Measure* the results 6. Make the process transparent 7. Do rapid, easy, and quick tracking	1. Select topics and ideas of interests 2. Submit micro-goals and action items 3. Enter monetary returns 4. Invite network of reviewers 5. Update the monetary returns 6. Share micro-learning ideas 7. View 24/7 real-time reports

Chart 1.0

Let us use the metaphor of forensic criminal investigation. Before the use of DNA in presenting evidence, criminal investigators were limited to physical evidence, and this limitation stymied them. The capabilities provided in DNA testing have profoundly changed the way investigations and prosecution are accomplished – not to mention the impacts on the delivery of fair justice.

> By focusing on the *micro-learning* ideas (Learn), the immediate on-the-job application (Apply), and an easy way to collaborate (Network), track and report real-time (Measure) – all these at the hands and control of learners and leaders – we may have another way of looking at the DNA of measuring training results.

Although it is too early to say, this approach is definitely contrary to the practices and principles of top-down-corporate sponsored ROI studies.

Jeff Valentine

"It was helpful in making me think about it, and showing that there is a return on investment without going into too much complex details or problems on how I arrived at the measurement."

Micro Case No.1
Jeff Valentine
Training Manager, TJX Companies, Inc.
Event: Training 2007 Conference, Orlando
Micro-ideas: Work with Loss Prevention Manager
Goal: $5,000
Time: June 22 - July 06, 2006
Expense: $1,000
Early returns: $5,000

Jeff Valentine

Jeff Valentine is responsible for creating and facilitating dynamic training programs to maintain TJX's industry leadership. He handles the Loss Prevention professionals from 225 TJX stores in Southeastern United States and Puerto Rico. Part of Jeff's work is to be a content provider for TJX Regional Loss Prevention Managers.

Upon attending Bob Pike's talk at Training 2007, Jeff felt that beyond this job description, he should also become a trusted advisor to his internal clients. He planned to travel along with the Regionals to build relationships and trust which would result in greater willingness to discuss operational issues openly, providing insight into real problems Jeff could help address through training. This plan - paired with other techniques he learned for increasing retention of training participants - held real promised for reducing the company's exposure to risk through lack of compliance.

Jeff was determined to monitor the results of his learnings and goals. He felt the discipline of recording his micro-goals following the conference, then developing written action plans ensured he followed through in a focused and meaningful way. Said Jeff "It was actually of good value because normally, after a conference, I probably would never try to qualify how the conference helped, or would never be asked to verbally qualify it – nothing written, nothing official."

Micro-Goal Details More	
Training Expenses:	$1,000.00 Notes: Hotel, airfare and meals cost.
Micro-Goal Name:	Travel with the Regional Loss Prevention Manager and tour stores
Description:	Travel with the Regional Loss Prevention Manager (RLPM) and tour stores. Traveling will provide quality time with the RLPM. Using the list of questions in Bob Pike's presentation to encourage conversation.
Timelines:	Jun 22 2007 — Jul 06 2007
Status:	Completed
Priority:	High

As a result of clearly identifying and documenting his micro-goals, it was easy to use the same web-based application, for Jeff to track and report his results:

Payback Details More	
Estimated Monetary Value from realizing the goal	$5,000.00 (Compliance Savings)
Notes	Compliance savings will generate from savings related to knowledge of current events within the Region, development of the District Loss Prevention Managers and insight into the Region's Loss Prevention staff.

At the same time, Jeff clearly demonstrated the financial value to his employer, TJX, of the investment it made in his attendance to the Training 2007 conference.

Learn
Implemented trust-building techniques to create open communications

Apply
Record action items and calculate potential annual savings using web–based tool

Network
Used relationships to better identify real compliance issues and solutions

Measure
Measured results of action plans to verify anticipated cost savings to company

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Renee Smith

"Being able to actually demonstrate value is a big win-win for the employee and the organization."

Micro Case No.2
Renee Smith, Training Consultant,
American Heart Association
Event: Training 2007 Conference, Orlando
Time: Apply in 6 months
Goal: $27,000
Micro-ideas: Help Students Learn Better and Faster
Expense: $1,800
Early returns: $27,000

Renee Smith

Renee Smith's work at the Office of Technology and Consumer Strategies for the American Heart Association includes educating the specialists who answer incoming calls from all over the country. Even without medical training, these specialists should be able to direct the customer to the life-saving information needed on topics such as CPR, diseases and other medical conditions.

After attending the Orlando Training Solutions Conference in February 2007, Renee decided to focus on three goals. "My first goal was to basically help students learn better and faster. We are trying to determine if it is more effective for us to condense our four-week class to two weeks. We'll just have to see what happens after we do the evaluation. We can find out how successful the students are and see how the students feel about the training," Renee said.

The TrainingPayback® system allows the participants to invite their network of leaders, speakers, reviewers, and friends for comments, ideas, and suggestions towards achieving goals. Renee invited her mentor to be one of her reviewers and plans to talk more about her training experience to their management team. "My boss Yolanda Perez is very supportive of my development. She knows that I'm participating in this training, but she doesn't know all of the details." Using TrainingPayback®, Ms. Perez was able to observe the progress of the participants and impact of the training. In addition, she was able to comment on it.

Comments
(Optional - use to send a message, make a comment, or to report progress)

by **Yolanda Perez** 6 months ago

Renee,
Retaing knowledge is key to our specialists success; just as important is helping them to realize where to find information quickly and utilize customer care techniques to build releations. I look forward to review your next steps after your March 30th timeline. Please let me know how I can support you in your endeavors in training and retaining highly productive and caring specialists.

by **Renee Smith (Technology and Customer Strategies)** 5 months ago

- Chunking/segmenting information into curriculum for better retention has proven successful. This was accomplished through pre-work exercises (Element K), research assignments, and student presentation exercises prior to speakers or the introduction of a major skill/topic. Confirmation that chunking works was received through observation and feedback from presenters of how well prepared the students were and what great questions they asked during the presentations.

Sent via email to Yolanda and Renee.

by **Ray Jimenez** 5 months ago

Renee,
This is an excellent goal and measurements. It really helps to immediately apply small goals to ensure value of the learning. Incredible. Pleas let me know how I can help further. And thanks for being part of our study.
Best to you, Ray

Sent via email to Ray, Yolanda , and Renee.

by **Renee Smith (Technology and Customer Strategies)** 4 months ago

Conclusion – students were able to learn better and faster using the chunking method, as well as by integrating e-learning and self-paced learning into the training curriculum. The final exam that was designed to assess the retention of knowledge of a new hire class which lasts 20 days, was also used to assess the retention of knowledge on a class completed in half the time. The students in the shortened class did not receive all of the same information, classroom instruction or study time as the complete new hire class. The shortened class which included chunking/segmentation of information, as well as more self-paced learning opportunities was able to use their notes or on-line resources to complete the assessment. 12 out 13 students successfully completed the final exam with a score of > 70. The passing score for a new hire class is 85%. However, since the students in the shortened class did not have access to all of the same resources and information, the passing score was altered. The scores were used basically to assess students retention of information and to identify where students had learning gaps.

Sent via email to Ray, Yolanda , and Renee.

TrainingPayback® helps organizations measure results and address challenges immediately. Through instant, rapid and reliable response it potentially eliminates the burden of manual, paper-based tracking of training investments. Renee appreciated this feature of tracking her learnings and sharing these with others. Being able to actually demonstrate value is a big win-win for the employee and the organization."

Payback Report More Goals	Projected Estimated Value	Estimated Value To Date	Average Completion	Average PI Contribution Rating	Training Payback
Help students learn better and faster	$27,000.00	$27,000.00	100.00%	90.00%	$24,300.00

Renee feels that the TrainingPayback® system also allows the participants to take ownership of the training. "You know that you're accountable for using the learnings when you get back. Otherwise you just put it on the shelf and forget it."

Learn
Chunking content can reduce training time while increasing focus and effectiveness Measuring the results of training will confirm whether retention is increased while costs are reduced.

Apply
Use Training Payback to help participants set goals and create action plans

Network
Gather participant feedback
Share learner experiences and training results with mentors and management team

Measure
Measure savings realized from shorter training time
Measure learner retention and ability to apply training

Curt Valmy

"It [has] helped me to focus on taking immediate action on my learning, rather than having it sit, and also to focus on what parts of the Conference I would take action on."

Micro Case No.3
Curt Valmy
Trainer, Development Consultant
OM -Tech Learning
Event: Training 2007 Conference, Orlando
Micro-ideas: Isolate and Apply 5 Ideas in 30 Days
Expense: $2,000
Early returns: $3,600 (in-progress)

Curt Valmy

Curt Valmy is the hands-on president of OM-Tech Learning. Based in Fort Lauderdale, Florida, OMTech Learning is in the business of designing and delivering interactive, experiential and technology-based learning strategies, through the implementation of authentic and effective communication and instructional programs.

After attending the Orlando Training 2007 conference, Curt identified his goals. "The session I've chosen to follow was marketing skills for trainers. I guess any business is always interested in increasing its marketing and effectiveness of its marketing." He closely tracked sessions where he picked up performance ideas. He expressed the impact of his action enthusiastically: "It expanded my overview about what marketing techniques could be employed in a training center, for a trainer, and I'd say that the main thing I was looking at was getting some fresh ideas about how to market effectively…I chose to isolate about ten of the 58 or so marketing ideas that were in the session. I just picked the ten that I would be likely to follow through."

Payback Details More					
Estimated Monetary Value from realizing the goal	$40,000.00 (Increase Sales)				
Notes	easily can increase sales by this much, for an average of 2,500/month. Can be done inexpensively.				

Action Items	Description	Start Date	Target Date	% Completed	Priority
choose 10 techniques	from the list of 58 from the session, choose 10 that I would consider implementing	02 Mar 2007	05 Mar 2007	100.0%	High
Implement choices	put 5 of the 10 choices into action within 45 days...about 1 new way per week	07 Mar 2007	13 Apr 2007	50.0%	High

Payback Report More Goals	Projected Estimated Value	Estimated Value To Date	Average Completion	Average PI Contribution Rating	Training Payback
Marketing Plan Adjustment	$40,000.00	$3,600.00	12.00%	100.00%	$3,600.00

Although this is only a small percentage of the $40,000 goal, Curt has already recouped the expenses for attending the conference.

Using the web-enabled tool, Curt implemented "…the creation of a network to support me in my action on my goals. I learned a lot about some aspects of networking: the invitation process, who I wanted as my reviewers, how to properly ask them and engage them… and how they could support me. "It's not something I normally do. I normally take up things [by myself] as an individual – Superman! Networking is one of my biggest takeaways."

Learn
Captured actionable marketing micro-ideas; value of building a network of mentors and peers who can help accomplish your goals

Apply
Selected and applied 10 ideas most likely to follow-through on; implemented to a manageable level…about 1 per week

Network
Utilized the network to reflect on action plans, develop relationships, receive suggestions and resources

Measure
Measured results of action plans to validate the value of individual marketing ideas

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Michele Schrotter

"By applying what I learned from the conference, it was possible to immediately improve systematically how I worked with SMEs."

Micro Case No.4
Michele Schrotter
Training Specialist, Bouchard Insurance
Event: Training 2007 Conference, Orlando
Micro-ideas: Subject Matter Expert – Systems Improvement
Time: Apply over 1 month
Goal: $2,550
Expense: $1,800
Early returns: $27,000

Michele Schrotter

As Training Coordinator for Bouchard Insurance, Michele develops, designs, and coordinates training for all sales people in four branch operations. She is certified to train the agents for their continuing education on topics such as agency management system, insurance coverage, insurance rules and regulations and skill development.

After attending the Training Solutions Conference 2007 in Orlando, one of her goals was using the SME Mapper to create a more thorough and efficient process of working with Subject Matter Experts. "Our SMEs are very busy people and valuable experts in my organization. If I can streamline the process of preparing, interviewing, and getting them involved to reduce the time, improve our working relationship, and improve quality of the programs, then this would be a desirable goal." The illustration below shows Michele's Dashboard and Micro-Goals.

Micro-Goal Details More	
Attendance Costs:	
Micro-Goal Name:	SME
Description:	Create a systematic efficient way to create classes using SME's.
Timelines:	Mar 15 2007 — Apr 17 2007
Priority:	High
Last Update:	Apr 27 2007
Estimated Monetary Value - Projected:	$2,550.00 (Efficiency Savings)
Estimated Monetary Value To Date:	$2,550.00
Percent Completion To Total Goal:	100.0%
PI Contribution Rating:	20%
Training Payback:	$510.00

Upon implementing her plan, Michele commented, "By applying what I learned from the conference, it was possible to immediately improve systematically how I worked with SMEs. This saved time, prevented wasted work, and reduced stress. Focusing on this one goal made it possible for me to see real returns with my efforts." Michele knew she had saved her own time, the SME's and the company's resources because she measured the results applying what she learned and implementing her goal. Below, her dashboard shows her results:

Payback Details More	
Estimated Monetary Value from realizing the goal	$2,550.00 (Efficiency Savings)
Notes	10 hours of my time X $150 per hour=$1,500 (contracted price)
	3 hours of Earl's time X $350 per hour=$1,050

Elle Callahan

"One of the expectations of my company in funding my trip to Training 2007 was goal-setting. The TrainingPayback® tool was a perfect resource to demonstrate my personal engagement in my professional development

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Micro Case No.5
Elle Callahan
Training Manager, cMarket
Event: Training 2007 Conference, Orlando
Micro-ideas: Research LMS Vendors for Immediate Purchase
Goal: $5,000
Time: Apply over 1 month
Expense: $1,800
Early returns: $5,000

Elle Callahan

As cMarket's Training Manager, Elle Callahan manages external client training under the Vice President of Client Services. She manages Instructor-Led Training (ILT), producing e-learning, and other learning initiatives within the team such as: Knowledge Base management and forum facilitation.

Elle explains her reasons for attending Training 2007 and why achieving her goals is important to her: "I am currently the sole Training staff/developer in my company; at times, business needs can supersede what I know to be effective and efficient as a trainer; therefore, it is important to me to center myself in my own profession and reinforce my skill sets."

Elle agrees that creating shorter or smaller goals enables quicker application and learning and appreciated that the Training Payback web-based system allowed her to create self-directed goals. According to Elle, "It forced me to really boil down my objectives for attending each of the sessions. This tool asks you to break down actions and that was very helpful for me in terms of meeting expectations on a day-to-day basis."

Micro-Goal Details More	% Completed	Target Date	Projected	Outcomes	Status
Acheive Training Manager certification	100.0%	May 29 2007	$7,500.00	$7,500.00	Completed
Better communicate & measure the ROI of Training	100.0%	May 29 2007	$15,000.00	$4,500.00	Completed
Research LMS vendors for imminent purchase	100.0%	Feb 28 2007	$5,000.00	$5,000.00	Completed

"One of the things I liked about the training impact tool was that it was a built-in way for me to calculate my attendance to the conference. I've received a lot of feedback from my own VP. He was astounded that the tool is even offered! He wished that more career niches had such tool. I was very happy to be able to use it for my own goals that way,"

TrainingPayback® was most helpful for Elle during the conference. According to her, "One of the expectations of my company in funding my trip to Training 2007 was goal-setting. The TrainingPayback® tool was a perfect resource to demonstrate my personal engagement in my professional development endeavors. The tool made it simple to construct a basic plan to share with my team."

Below, Elle shares her plan with team members by inviting them to view her plan and results using the online tool:

Micro-Goal Details More	
Training Expenses:	$0.00 Notes: Based on prior session costs.
Micro-Goal Name:	Better communicate & measure the ROI of Training
Description:	Many of the hour-long conference sessions throughout the span of the week focus on measuring the ROI of training & learning (people, projects, and programs). I plan to attend as many subject-related sessions as possible in order to help assess the ROI of training-related Client Services programs and services such as: EOAR reporting, use of KnowledgeBase (on-demand), etc., in order to increase: 1) client productivity and 2) trainer effectiveness.
Timelines:	Feb 26 2007 — May 29 2007
Status:	Completed
Priority:	Medium

Payback Details More	
Estimated Monetary Value from realizing the goal	$15,000.00 (Efficiency Savings)
Notes	Reduction in inbound calls made to client services, at monetized value of $25 per call reduced. -$25/call -50 calls/mo; 600 calls/yr

Elle expressed that TrainingPayback® offers a hassle-free way of tracking training investment and results compared to the traditional manual and paper-based tools.

Learn
Better tools and techniques to increase and measure training ROI

Apply
Record action items and calculate annual savings using the web–based tool

Network
Share goals, plans and results with team members to increase communication and efficiency

Measure
Forecast, then measure training ROI to aid Client Services in reducing inbound calls

Gary VanAntwerp

"With the Social Networking functionality, I observed how learners planned to act on what they learned and provided them feedback."

Micro Case No.6
Gary VanAntwerp, VP of Training
NorthPoint Real Estate Investment Services
Event: Training 2007 Conference, Orlando
Time: Apply in 2 months
Goal: $1,800,000
Micro-ideas: Track Sales Training Results
Expense: $11,000
Early returns: $1,620,000

Gary VanAntwerp

While attending the Training 2007 Conference in Orlando, I listened to Don Kirkpatrick admonish the industry for applying his own ideas to death…to the point that we can no longer recognize the results as useful and actionable information. The bottom-line, he said, was to keep the measurement of training at a simple level. 'Do learners get practical ideas they can apply?' 'Do they apply them?' 'What happens?' The next day, I attended a session about TrainingPayback. It seemed a perfect solution to Kirkpatrick's challenge. I learned I could use TrainingPayback to help Learners capture the practical ideas, create action plans and observe in real-time what happened when they did. With its Social Networking functionality, TrainingPayback also provided a way to observe how learners planned to act on what they learned and provide them feedback.

Learn
Measure financial impact of training; observe participants' action plans and implementation; Provide feedback

Apply
Identify the Performance Ideas they could use (micro-goals); create action plans to implement ideas; solicit feedback from leaders, mentors and peers using social networking

Network
Training participants to solicit and receive feedback from mentors, leaders and peers

Measure
Compare results of changes to curriculum; verify changes to course-enhanced success of participants; measure financial impact of training program

Participants used TrainingPayback to invite leaders, mentors and peers to review action plans created to implement the micro-goals they identified during training. We were stunned! We had selected excellent strategic investment advisors. But TrainingPayback's social networking functionality revealed critical deficiencies in a key skill: participants' ability to create effective plans to market themselves and our services.

I modified the course to include sessions on marketing skills. I used TrainingPayback to measure the impact of the course changes. Once our measurements showed improvement, I added more marketing focus. Measuring with TrainingPayback showed dramatic results across three successive classess.

	Participants	Class Revenue	Revenue Per Participant	Unit Sales in 1st 30 Days	# Participants with Sales	% Participants with Sales
Class #1	9	$200,000	$22,222	1	1	11.1
Class #2	6	$750,000	$125,000	3	2	33.3
Class #3	4	$1,250,000	$312,000	5	3	75%

Micro-Goal Details More	%Completed	Target Date	Projected	Outcomes	Status
Training Payback Implementation	100.0%	May 15 2007	$400,000.00	$1,800,000.00	Completed

Payback Report More Goals	Projected Estimated Value	Estimated Value To Date	Average Completion	Average PI Contribution Rating	Training Payback
Training Payback Implementation	$400,000.00	$1,800,000.00	100.00%	90.00%	$1,620,000.00

Note: Gary VanAntwerp's project was an in-house project applying what he learned from conference.

April White-Castaneda

"The Training Impact process and web-based tool have taught me to be more concrete and more conscientious about what I choose, why I choose, and how I'm going to bring that back [to my workplace]."

> **Micro Case No.7**
> April White-Castaneda
> Training Manager, California Institute of Technology
> Event: Training 2007 Conference, Orlando
> Micro-ideas: Creating Informal Learning Opportunities
> Time: Apply over 3 months
> Goal: $3,600
> Expense: $1,800
> Early returns: $3,600

April went to the Training 2007 Conference in Orlando with a goal of finding and implementing ways to create opportunities for informal peer-to-peer learning rather than structured presentations. Doing so would provide many learning opportunities while conserving the institute's budget resources.

"...It really fits with the adult-learning model, that people do well when they have self-directed goals and their goals are important ... and make sense to them in the work and the business they're doing. Often people will resist learning because they don't feel it necessarily applies to their work. The more self-directed the goals, the more successful something is going to be because people are bought into it."

As a way of holding herself accountable for her choice of sessions and the learning itself, April entered her goals into the web-based system:

Micro-Goal Details More	
Training Expenses:	$1,800.00 Notes: This includes the cost of food, room setup and photocopying of interesting articles for the group to ponder. This cost covers 6 meetings.
Micro-Goal Name:	Creating Informal Learning Opportunities
Description:	Creating informal learning opportunities by creating programs and spaces that allow peers to learn from each other. For example, we have a women's professional mentoring group that was already developed prior to attending the conference. This group is called the Women in Mid-Career Series. The goal is to get women employees who are in mid-level positions at the Institute to gain professional development tools and learn to collaborate with across offices.
Timelines:	Mar 05 2007 — Dec 31 2007
Status:	In Progress
Priority:	High

Payback Details More	
Estimated Monetary Value from realizing the goal	$3,600.00 (Cost Savings)
Notes	This represents a cost savings from using informal learning versus using a formal facilitator led training. The savings is derived from the reduction in cost for a professional faciltator, cost of travel and formal instructional materials.

April attended a session on informal learning by Jay Cross. Afterward, she entered her micro-goal into Training Payback, enabling her to track her goals and the financial benefit of executing her plan.

As a result of the web tool's requirement to enter costs and savings, April reports, "I can tell you cost savings right now because I had to think about how I could apply the concepts from Jay Cross' session and how I was working with our women in mid-career positions on campus. A trainer coming in doing a half-day session would cost $2500 per session. On the other hand, doing an informal session with the same group would cost only $600."

By applying her learnings at the conference, April was able to use the web-based tool to calculate and report the cost savings of both her attendance at the conference and of accomplishing her self-set micro-goal with just a single informal learning group.

Now that April is able to prove the financial value of her concept, it will be interesting to see – and measure - the cumulative effect of her efforts over time. "People who didn't know about the [Informal Learning] program have heard about these meetings and its impact on the people attending. Now, there's more willingness to go out and do more things; for example, our travel department is now doing bi-weekly travel training, [something] they have not done in years. The training has been quite successful and provides an invaluable service to the community."

Learn
Natural pathways to creating informal learning (Jay cross); How to use learning and training styles to make the learning last

Apply
Connect small groups (i.e. Mid-Career Women) and individuals to facilitate informal learning and collaboration

Network
Reach across artificial social / professional boundaries to cultivate ideas, feedback and new resources

Measure
Solicit and observe report-back feedback to measure program acceptance and benefits; Calculate the monetary difference between facilitator-led vs peer-to-peer learning to prove the financial value of concept

The SocioGram

The SocioGram helped participants in surprising ways.

They learned intuitively, without help and guide, that their position in the SocioGram explained the depth of their interactions and completion of their goals. Consequently, the SocioGram acted as a self-driven feedback mechanism.

Participants also begun using the SocioGram as a way to look for people and find related goals and topics of interest. Another observation based on what we saw as feedback from the SocioGram, is that the interactions were limited to a few comments and people. We feel that this is because the micro-goals are very focused, narrow and specific. If the goals were bigger requiring more resources and time, the extent of interactions may be far greater.
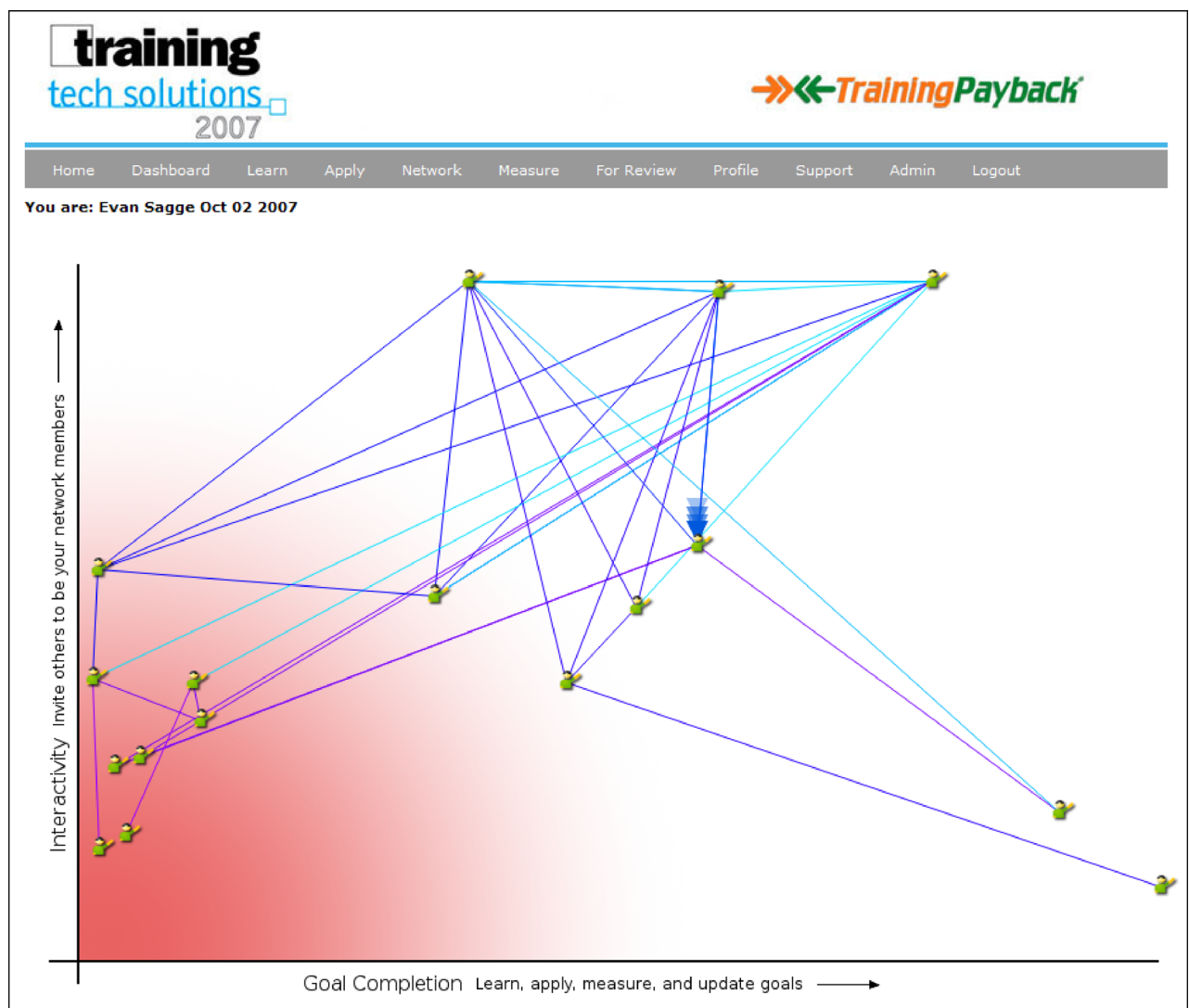
Ray Jimenez, PhD
Author

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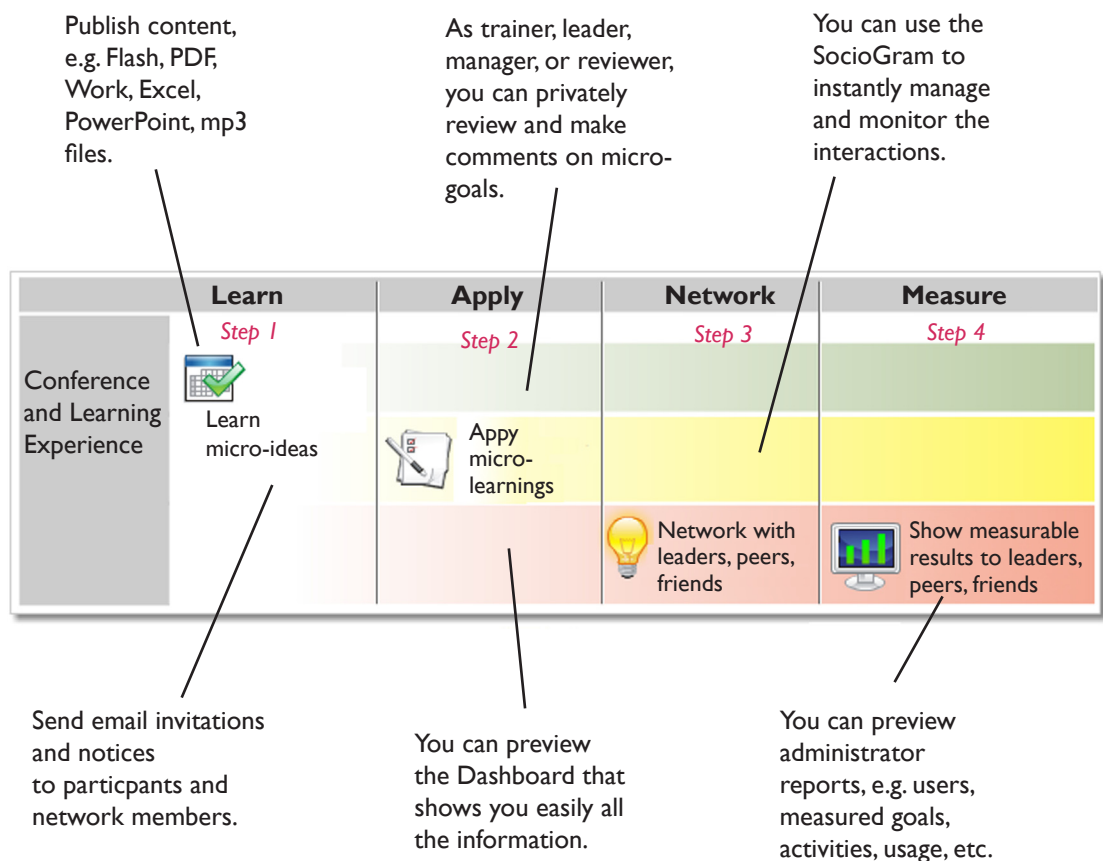
Ray Jimenez, Ph.D. started his career in Organization Development and learning systems with Coopers & Lybrand. Ray is the architect of VFT's Learning & Performance Systems (LPS) and www.TrainingPayback.com, a performance-driven social networking system. He is the author of "3-Minute e-Learning" and soon to be published book on Learning Impacts: How Micro Learning Goals, Lead to Huge Dollar Returns." Ray leads a global and virtual e-learning content development team and system professionals. Among his clients are Booz Allen Hamilton, Ernst & Young, Psychological Associates, Transamerica Financials, Boeing Company, Ryland Homes, Countrywide Home Loans, Oracle Corporation, U.S. Air Force, Oakwood Worldwide, Aramark, Chipotle Restaurants and National Aeronautic Space Administration (NASA). Ray has presented to several associations and business organizations worldwide including American Society for Training and Development (ASTD), Training Magazine Events, and e-Learning Guild, Hong Kong Open University, Online EduBerlin, and SENA in Bogota. He completed his Ph.D. from St. Peter's College and Studies in Interactive Media from the University of California, Los Angeles.

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As trainer, leader, manager, or reviewer, you can privately review and make comments on micro-goals.

You can use the SocioGram to instantly manage and monitor the interactions.

	Learn	Apply	Network	Measure
	Step 1	*Step 2*	*Step 3*	*Step 4*
Conference and Learning Experience	Learn micro-ideas	Appy micro-learnings	Network with leaders, peers, friends	Show measurable results to leaders, peers, friends

Send email invitations and notices to particpants and network members.

You can preview the Dashboard that shows you easily all the information.

You can preview administrator reports, e.g. users, measured goals, activities, usage, etc.

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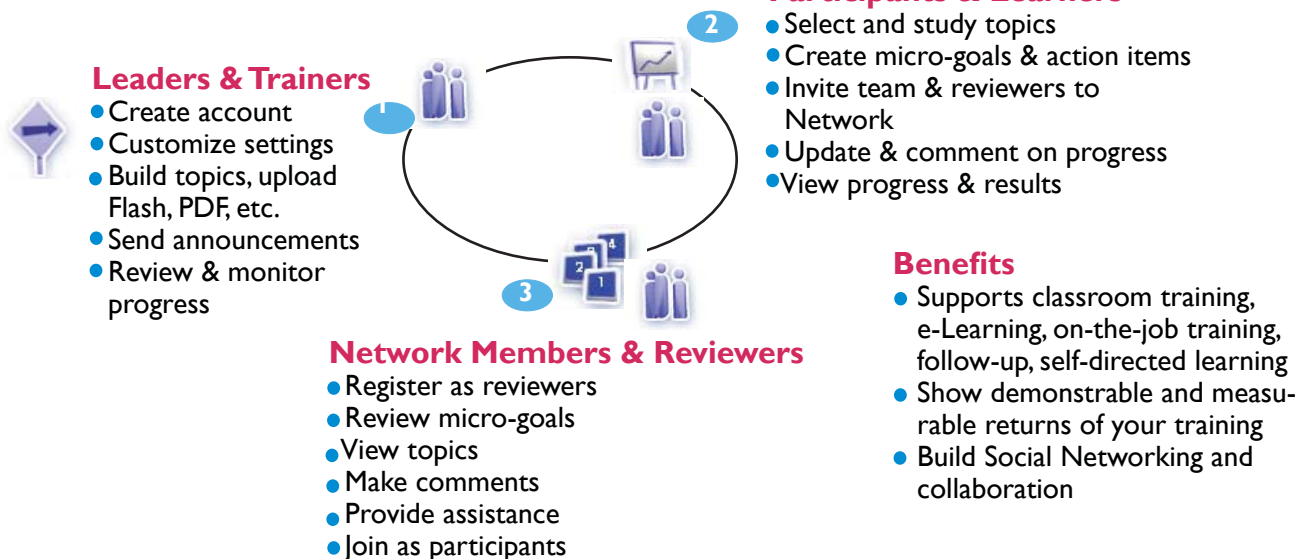### Visit www.TrainingPayback.com

About TrainingPayback®

TrainingPayback is a Web-based system that helps participants learn and apply micro-learning ideas, network with leaders, peers and friends to review micro-goals and action items, and show proof of measurable outcomes. TrainingPayback helps track, justify, and focus training investment and improves the effectiveness of the training efforts.

How TrainingPayback® Works

Training Goals & Applications

Leaders & Trainers
- Create account
- Customize settings
- Build topics, upload Flash, PDF, etc.
- Send announcements
- Review & monitor progress

Participants & Learners
- Select and study topics
- Create micro-goals & action items
- Invite team & reviewers to Network
- Update & comment on progress
- View progress & results

Benefits
- Supports classroom training, e-Learning, on-the-job training, follow-up, self-directed learning
- Show demonstrable and measurable returns of your training
- Build Social Networking and collaboration

Network Members & Reviewers
- Register as reviewers
- Review micro-goals
- View topics
- Make comments
- Provide assistance
- Join as participants

Benefits of TrainingPayback®

TrainingPayback is a Web-based system that helps you enjoy these benefits:

- Justify and win approval of your training investment
- Focus investments on training programs that pay back
- Facilitate participant-speaker-manager-peer social networking
- Increase learning quality and persistency
- Encourage personal accountability for learning and application
- Enable real-time and dynamic applications of training to job performance
- Track measurable outcomes as training is in progress
- Provide leaders and managers a way to see proof of results
- Reduce, if not eliminate, the burden of manual and paper-based tracking of training investments

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