

*Increased  
productivity  
through  
skill building*

*Boost Training  
Transfer Using  
Predictive Learning  
Analytics*

*Hawkeye ATD 2016 Conference  
September 15, 2016*



PHILLIPS  
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## Today's Presentation

What is the number one issue facing the L&D profession today? It's "Scrap Learning," a term coined by KnowledgeAdvisors that describes the wasteland of learning that is delivered but not applied back on the job.

How big is the problem? According to various research studies, it is estimated to be between 45 and 80 percent, making it a critical business issue.

So what's the solution? The short answer is Predictive Learning

Analytics™ (PLA). PLA enables you to do something amazing – something never before seen in L&D industry. It allows you to predict the future!

Specifically, it allows you to predict, immediately following a learning program, which learners are most and least likely to apply what they learned in the program back on the job.

In this session you will examine the 3 phase 9 step PLA process, analyze how to build a PLA algorithm, and examine the 6 benefits of using PLA.

*"Great speaker and subject matter. Ken's expertise really made the event worthwhile."*

–South Central Wisconsin ATD  
Chapter Member

*"Ken supported the material with relevant examples and activities and I was able to related the correct method to my company's current practice."*

–South Florida ATD  
Chapter Member

*"Incredibly helpful – simple, valid and effective way to reduce scrap learning."*

–South Florida ATD  
Chapter Member

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## About Your Presenter — **KEN PHILLIPS, CPLP**



Ken Phillips delivers all programs and workshops in his signature style: professional, engaging, and approachable.

Ken is founder and CEO of Phillips Associates, a consulting and publishing company with expertise in measurement and evaluation of learning and performance management. He has more than 30 years experience designing learning instruments and assessments and has authored more than a dozen published learning instruments. He regularly speaks to Association for Talent

Development (ATD) groups, university classes and corporate L&D groups. Since 2008, he has spoken at the ATD International Conference on topics related to measurement and evaluation of learning. In addition, in 2015 he was invited to present at the ATD Middle East North Africa (MENA) Conference and the ATD China Summit on topics related to measurement and evaluation of learning.

Prior to pursuing a Ph.D. in the combined fields of organizational behavior and educational administration at Northwestern University, Ken held management positions with two colleges and two national corporations. In addition, he has written articles that have appeared in *td* magazine, *Training Today* and *HR.com*, and is a contributing author to four books in the L&D field.

Currently Ken is serving his eleventh year on the board of directors of the Chicagoland Chapter of the Association for Talent Development (CCATD), and was chapter president in 2008. He earned the Certified Professional in Learning and Performance (CPLP) credential from ATD in 2006 as a pilot pioneer and was recertified in 2009, 2012 and again in 2015.

Ken can be reached at (847) 231-6068 or [ken@phillipsassociates.com](mailto:ken@phillipsassociates.com).

### Upcoming Events:

Ken is a frequent presenter at ATD chapter meetings and other industry events. Here's a preview of where he'll be speaking next.

#### September

##### 30 **ATD CORE 4 Conference**

Topic: Boost Training  
Transfer Using Predictive  
Learning Analytics

#### October

##### 5 **University of Wisconsin Milwaukee**

1-day Workshop: Survey  
Design Beyond the Basics

##### 16 **BAI Training Forum**

Topic: Boost Training  
Transfer Using Predictive  
Learning Analytics

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# Predictive Learning Analytics™ Job Aid

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- **Scrap Learning:** Term that describes the **gap** between learning that is **delivered** and learning that is **applied** back on the job\*
- **Magnitude of problem:**
  - According to a CEB 2014 white paper, in the average organization, 45% of all learning delivered ends up as scrap
  - According to a Rob Brinkerhoff 2004 research study, nearly 20% of participants never attempt to apply what they learn in a training program and another 65% try what they learned, but soon revert back to their old ways. That amounts to more than 80% scrap learning
- **View from individual organization level:**
  - According to the *ATD 2015 State of the Industry Report*, the average per employee training expenditure in 2015 was \$1229 and the average number of training hours consumed per employee was 32.4
  - Using the CEB 45% scrap learning figure, this translates into \$553 of the \$1229 spent per employee and 14.6 of the 32.4 hours consumed per employee ending up as scrap learning
- **The Solution: Predictive Learning Analytics™ (PLA):** A method for peering into the future, at the conclusion of a learning program, and forecasting learner outcomes and actions, with the intent of changing those outcomes and actions for the better.
- **The 3 Phase 9 step PLA methodology**
  - **Phase 1: Building the methodology**
    1. Select a single, high-profile, and costly learning program for your PLA project and identify a Calibration Cohort (*Note: It is recommended that you initially stay “under the radar” until you have some results to share*)
    2. Build the PLA algorithm and include in a current Level 1 evaluation or create a separate survey
    3. Collect data and calculate an individual Learner Application Index™ score for each program participant
    4. Calculate “scrap learning” percentage baseline score associated with the program and identify obstacles preventing training transfer





- **Phase 2: Implementing the methodology**
  5. Develop strategic follow-up activities and target learners **at risk** and **least likely** to apply what was learned back on the job for reinforcement
  6. Conduct Level 2 – learning and Level 3 – behavior evaluations in order to validate accuracy of PLA algorithm
  7. Recalculate “scrap learning” percentage & validate accuracy of PLA algorithm
- **Phase 3: Sharing your success**
  8. Report results to business executive stakeholders
  9. Enhance accuracy of PLA algorithm by including additional data from company LMS or HRIS, if available
- **Heart of PLA:** Algorithm consisting of 10 factors that are known to contribute to training transfer and research has shown have a strong positive correlation with either Level 2 learning, Level 3 behavior or Level 4 business results
- **The ten factors...Learners need to:**
  1. Acquire new information
  2. See a program as relevant to self and job
  3. See a program as important investment in own career development
  4. Be personally motivated to apply what was learned
  5. Have confidence in their ability to apply what was learned
  6. Reflect on key lessons learned and how they can help improve their performance
  7. Be actively engaged by manager, post-program, regarding what was learned
  8. Be supported by work colleagues, post-program, to apply what was learned
  9. Have an immediate opportunity to apply what was learned
  10. See a likely improvement in business metric tracked by department if new information applied
- **Algorithm calculations:**
  1. *Learner Application Index™* scores – identify participants who are **most likely, at risk** and **least likely** to apply what they learned in a program back on the job. Target participants **at risk** and **least likely** to apply what was learned for follow-up and reinforcement activities in order to increase training transfer
  2. *Manager Training Support Index™* scores – identify managers/supervisors who do a **good** and **poor** job of supporting learning. Work with those managers/supervisors who need help doing a better job



3. Overall Program Quality score – compare the quality of one program with another. Target programs not delivering value for either revision or elimination

➤ **Benefits of using PLA**

1. Less money and time wasted on learning that is delivered but not applied back on the job – scrap learning
2. Increased personal credibility in eyes of business executive stakeholders
3. More effective and efficient use of follow-up and reinforcement activities by targeting those participants **at risk** and **least** likely to apply what they learned in a program back on the job
4. Objective way to identify managers and departments that do a **poor** job of supporting learning so that their approach can be improved
5. Objective way to compare the overall quality of one learning program with another using a single number
6. Enhanced reputation among L & D colleagues

\* Coined by KnowledgeAdvisors, a Corporate Executive Board Company

## Training Resources Available from Phillips Associates

### Insightful Learning Products

*Turnkey training resources for organizations and individuals*

Phillips Associates offers an array of learning instruments, multi-rater assessment systems, handbooks (job aids), manuals and games designed to develop specific skills in the areas of performance management and sales performance. Some of our best-sellers include:

#### ***No Pain—All Gain!* Performance Appraisal Meeting Inventory**

Help managers conduct performance appraisal meetings that improve employee performance and are viewed as valuable and worthwhile using the Performance Appraisal Meeting Inventory. The instrument pinpoints a manager's strengths and development needs in six skill areas and outlines a simple six-step process for conducting effective performance appraisal meetings.



#### ***Getting On the Same Page:* Objective Setting Handbooks**

Easy to read booklets (one for managers and one for direct reports) filled with proven tips and techniques on transforming the objective setting process from little more than an annual ritual into a valuable, worthwhile experience for everyone involved. Includes a set of worksheets the reader can use to prepare a set of objectives.

#### ***Acting the Part:* Performance Management Role Plays**

Ready-to-use role play scenarios designed to help managers, supervisors and team leaders apply and practice the skills needed for coaching effectively and conducting productive performance appraisals. Includes half-day workshop design and PowerPoint slides.

#### ***Coaching to Win:* Coaching Meeting Inventory**

The Coaching Meeting Inventory assesses a manager's strengths and development needs in eight skill areas and outlines a logical step-by-step process for conducting effective coaching discussions.

#### ***Superior Service Starts Here:* Customer Service Skills Inventory (CSSI)**

CSSI consists of 32 statements divided into four keys of providing superior customer service: Developing a relationship of Interpersonal Trust, Listening, Problem Solving and Professionalism. Based on how they answer the statements, customer service reps gain valuable insight into their greatest strengths and most pressing development needs in delivering superior customer service.

#### ***Taking Stock for Better Communication:* Communication Style Inventory (CSI)**

CSI consists of 24 sets of paired statements describing the four most commonly used communication styles: Aggressive, Avoiding, Accommodating and Collaborative. By choosing the statement that most nearly describes how they would communicate in a particular situation, respondents generate a profile of their use of the four communication styles.

**For descriptions of all Phillips Associates Learning Products, visit [www.phillipsassociates.com](http://www.phillipsassociates.com)**

#### **PERFORMANCE MANAGEMENT PRODUCTS**

- Performance Appraisal Meeting Inventory
- Managing Your Own Performance Appraisal Inventory
- Coaching Meeting Inventory
- Keys to Effective Coaching
- Objective Setting Inventory
- Interpersonal Feedback Inventory
- Objective Setting Games
- Performance Management Role Plays
- Objective Setting Handbooks
- Performance Appraisal Handbooks

#### **SALES PERFORMANCE PRODUCTS**

- Face-to-Face Sales Skills Inventory
- Cross-Selling Skills Inventory
- Territory Management Style Inventory
- Customer Service Skills Inventory

#### **MULTI-RATER ASSESSMENT PRODUCTS**

- Performance Management Profile System
- Selling Skills Profile System

#### **FOUNDATION SKILLS PRODUCTS**

- Communication Style Inventory



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## Performance Management and Sales Performance Programs

In addition to our full offering of learning products, Phillips Associates delivers interactive programs to help employees achieve and maintain better on-the-job performance. Our highly participative approach teaches more than just concepts and practices—it builds lasting skills. Some of our most popular programs include:

- ***Exceeding Expectations: Managing the Performance Appraisal Process***
- ***From Basics to Best in Class: Customer Service Skills***
- ***Coaching to Win: Coaching Employee Performance***

For a complete list of programs offered, please visit us at [www.phillipsassociates.com/seminars](http://www.phillipsassociates.com/seminars).

### The “How-To” Measurement & Evaluation Series Only Phillips Associates shows you how!

Presentations (75-90 minute learning programs with audience participation)

- **Power Up Your Level 1 Evaluations and Gain Surprisingly Useful, Valued Data**
- **Crack the Code of Test Question Design and Take Your Level 2 Evaluations to 2.5!**
- **Capture Elusive Level 3 Data: The Secrets of Survey Design**
- **Business Results Made Visible: Design Proof Positive Level 4 Evaluations**
- **Now Put Your Data to Work and Use it to Make a Difference**

2-day open enrollment workshops offered at various times throughout the year

- **Mastering M & E: Less Stress, More Success in Designing Level 1 – 4 Evaluations**
- **Boost Training Transfer Using Predictive Learning Analytics™**

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