The $64,000 Question

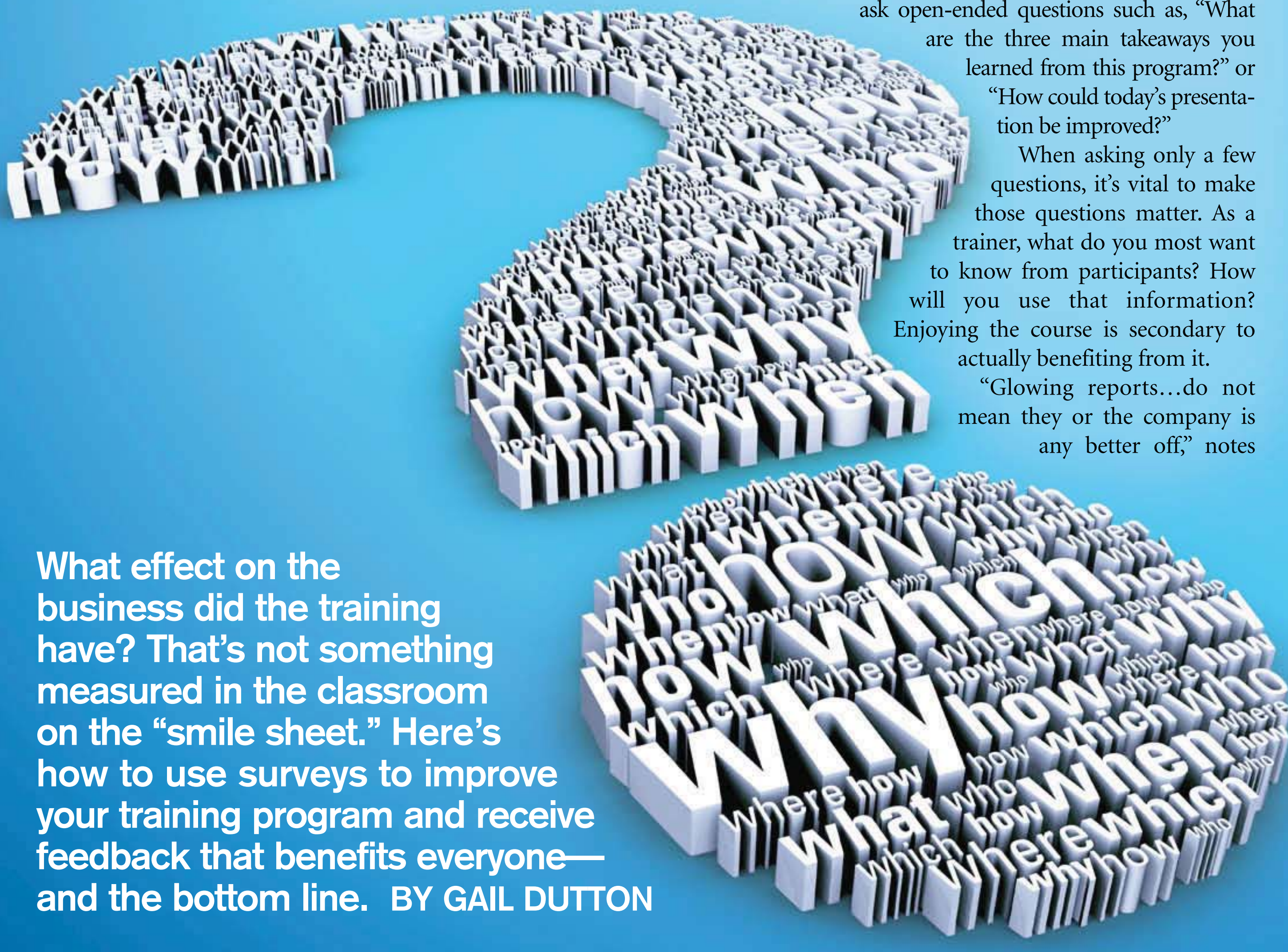
When it comes to surveys, short and relevant beats long and superfluous every time. The U.S. Census Bureau realizes that and redesigned the 2010 census. The new census is the shortest in history, with only 10 questions that can be completed in a total of 10 minutes. The Census Bureau is confining itself to basic information and knows how it will be used—another lesson for survey makers.

"With short surveys, I find the response rate goes way up," says Rick Maurer, founder of Maurer & Associates. In contrast, with 20-question surveys, "people hurry through." But, he admits, short surveys are pointless if they don't provide actionable information. That is where many surveys fail, especially those related to training.

As Shari Alexander, founder of Presenting Matters, LLC, explains, "The problem with the typical survey—scorecards with a 1-5 grading scale—is they don't provide much information." Her solution is to ask open-ended questions such as, "What are the three main takeaways you learned from this program?" or "How could today's presentation be improved?"

When asking only a few questions, it's vital to make those questions matter. As a trainer, what do you most want to know from participants? How will you use that information? Enjoying the course is secondary to actually benefiting from it.

"Glowing reports…do not mean they or the company is any better off," notes



What effect on the business did the training have? That's not something measured in the classroom on the "smile sheet." Here's how to use surveys to improve your training program and receive feedback that benefits everyone—and the bottom line. BY GAIL DUTTON

The $64,000 Question

Ann Latham, president and founder of Uncommon Clarity, Inc. Instead of measuring satisfaction upon course completion, experts agree the effect upon the business is what should be determined. As management and HR consultant Donna Flagg, founder of The Krysalis Group, stresses, "Training only matters if it affects business results. That can't be measured in the classroom on the 'smile sheet.'" Therefore, she recommends two-pronged surveys. One is administered after the class ends to look for evidence of learning on the spot. The other is administered some time afterward to address implementation.

The objective is to determine whether the training improved results, and that requires checking with sources in a position to know. To prove learning occurred, "the last people you should ask are the participants," says Alan Weiss, Ph.D., president of Summit Consulting Group, Inc. As Tom Smith, head of organizational development, Lane4 Management, explains, "If you set up the training in the right way, you know what behavior needs to change." Smith recommends allowing at least three months to elapse between the training and the survey, and then following up with supervisors. The questions should include:

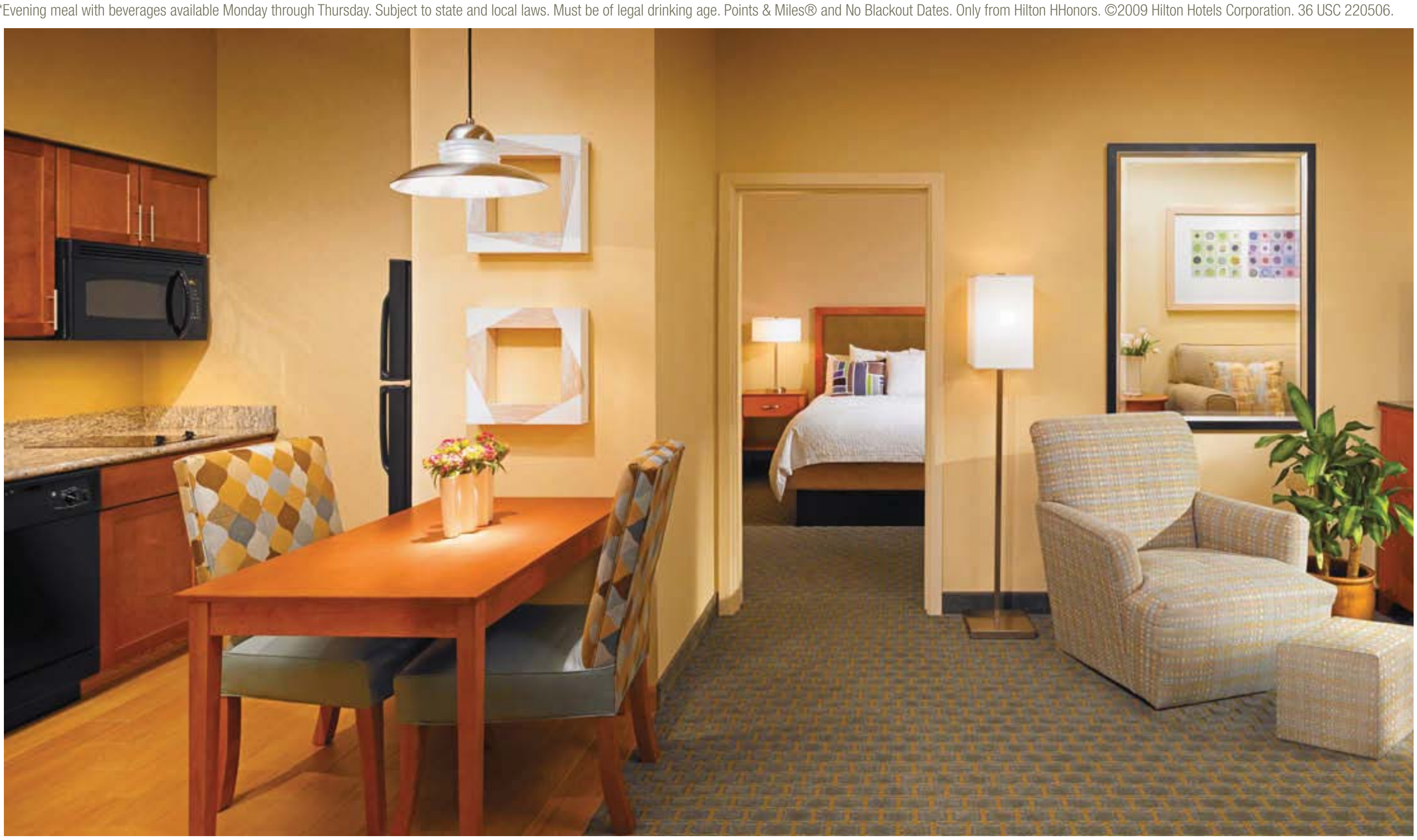
- "In what way has the person improved since going to the program?"
- "Has behavior changed in the ways you expected?"
- "How did the training affect the business?"
- "What's your evidence?

MEASURABLE METRICS

That last question, requesting evidence, is particularly important. For impressions of change to be valid, they must be supported by measurable metrics. Because quantifiable results may be affected by other factors, eliminate them by asking several questions, Smith advises, and measure the relative performance, as well as endpoints. For example, even stellar salespeople will have declining orders during a recession, so defining success only in terms of increased sales isn't valid, but defining it in terms of expectations or relative change in results, or against others' performance, may be appropriate.

Another factor that should be considered in determining the success of training is whether conditions exist to permit the training to be implemented. As Maurer acknowledges, "sometimes the training can be good, but employees aren't allowed to practice what they've learned." In some instances, the training may counter existing policies, or supervisors may disagree with the training premise. Maurer, therefore, also examines the work environment to learn whether individual employees had the opportunity to use the skills learned in training. As part of that evaluation, he also identifies which behaviors are rewarded and which are ignored.

Bringing supervisors along as partners is one strategy that makes the training more likely to be implemented. When the



Dallas-Frisco, TX

SURVEY TIPS

- Know what you want to learn.
- Identify what you will do differently as a result.
- Have short surveys.
- Ask open-ended questions.
- Check performance changes at least one month after the class.
- Determine whether participants' work environments let them apply the teachings.

Noyce Foundation hosted a leadership program for urban libraries, "the participants were hand-picked, and their supervisors had to commit to being in the program with them," Maurer says. "That made it a partnership." Also, he points out, participants came to the course with a project in mind. Consequently, the lessons had a direct application and the trainees were engaged. "When I work with people who have a project, the day couldn't be long enough," he stresses.

For the most important training sessions, Smith contracts with about 10 participants, to follow them intensely before, during, and after the program. This provides a baseline by which to gauge return on investment, and insights into the need for additional training or changes in the course itself. The Noyce Foundation, for example, hired Maurer to teach a course about leading change for directors of science museums in 2008. In some programs, the foundation followed up six months—and even 18 months—later. "That generated a lot of data," Maurer says, and resulted in refocusing the 2009 course to help directors identify their stakeholders.

CONTINUOUS IMPROVEMENT

"I rely heavily on feedback in a few areas," says management consultant and coach Geno Schnell, former director of the Foundation's Noyce Leadership Institute. Typically, "I conduct traditional course follow-up surveys to quickly capture the tenor of a participant's reactions, and any suggestions for improving the content or delivery. When I can, I add two additional inquiries…to capture one idea or concrete action to help get a window into what stands out, and a more directed question about how the content or delivery could be improved."

The Noyce Foundation and Schnell take course feedback seriously. Schnell reads each comment himself. He says the comments help him work with presenters to improve programs and delivery styles, show sponsors and funding sources the general reaction to the sessions, and start discussions about how to improve a training session or leadership program. The idea, he says, isn't to look for patterns. "Often, after asking about a single comment or just thinking about it, I can get to a new idea. Quite often, I reframe the topic, change the order of topics, add worksheets, slip in an example, add a group exercise, simplify slides, add reference material, etc., based on the feedback." t

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