

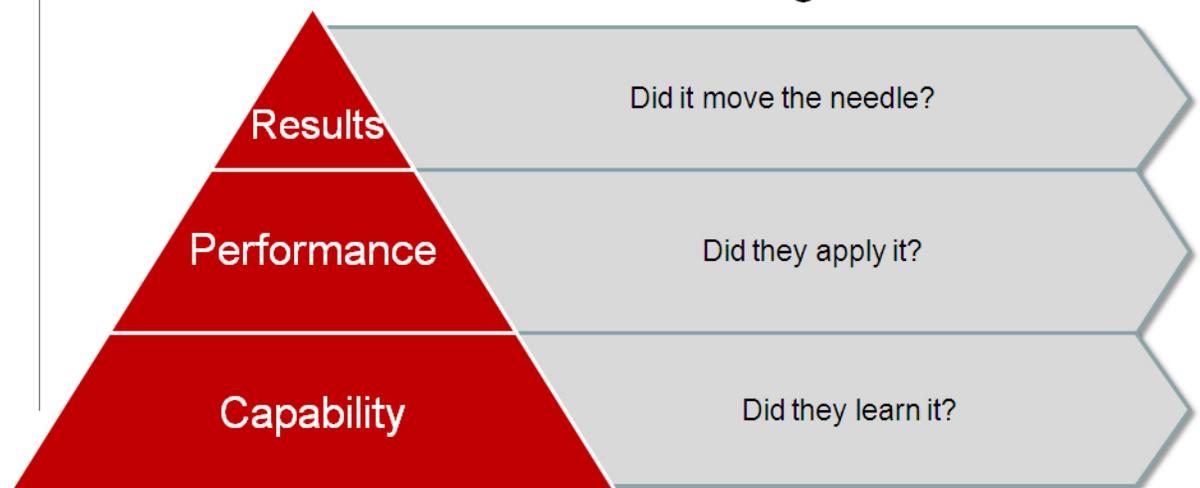
Measurement and Return on Investment

Duke CE has worked with many companies on the topic of measurement and ROI on learning investment and has been exposed to various measurement methodologies, including Kirkpatrick's 4-level model, Phillips' 5-level model, and others like Brinkerhoff's learning maps. Our experience has led us to believe that there are several important factors to consider for effective measurement of learning impact:

- The design, delivery, application and measurement of learning experiences are inherently connected and need to be tightly integrated in every program or learning intervention.
- A strategy for measuring learning effectiveness and impact should be defined at the beginning rather than the end of the program or intervention design.
- Successful measurement depends on clearly defined desired learning outcomes and key indicators (tangibles and/or intangibles) that are measurable, such as:
 - Individual capabilities and behavioral change
 - Functional area/business unit performance
 - Organizational business results

Thus, our point of view about measurement has evolved to believe that effective learning interventions must target the link between three types of outcomes: capability, performance, and results as measures of success.

Duke CE Point Of View: ROI of Learning



** Based on Kirkpatrick's 4 Measurement Levels, Phillips' Level 5 ROI, and Brinkerhoff's leveraged transfer learning maps.*

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1. *Capability* — Was the program effectively delivered and did participants learn? Practice in classroom with direct feedback, self-assessments and anecdotal stories; follow up with program evaluations and surveys (during and after) while key concepts and learning experience are top of mind.
2. *Performance* — Did they apply the learning? Build individual learning maps and application plans with specific goals and measures at completion of the conceptual and skills practice parts of the program. Qualitative data gathered through progress reports of application goals and measures 6-8 weeks post-training, through faculty-led virtual application sessions, office hours or interviews.
3. *Results* — Did the learning move the needle? Build application projects with direct links to business outcomes and scorecards; tie learning maps and individual application plans to specifically stated learning outcomes. Quantitative data from balanced scorecard measures directly related to share price, divisional goals, and other important business metrics.