Stacey Barr Pty Ltd
the Performance Measure Specialist
ABN 57 129 953 635
PO Box 422 Samford
Queensland 4520 Australia
Phone: 1800 883 458
info@staceybarr.com
www.staceybarr.com

Finding Meaningful Measures for a Hard-to-Measure Training Team

This case study is for educational purposes only and shouldn't be adopted as an off-the-shelf performance measurement solution. Each team's performance results and measures are unique to their own purpose and priorities. All details have been changed to preserve anonimity.

About the team

The training team regularly designs and delivers tailored training programs to their clients in the area of business planning and performance management.

This team struggled to find meaningful measures beyond the traditional training measures derived from "happy sheets", like Average Satisfaction Rating. They wanted something more meaningful to measure their true impact.

STEP 1: Get your team customer-focused

Step 1.1: What are the team's outputs?

The primary outputs of the training team include:

- Training materials for course participants
- Training workshops
- Post-training feedback reports

Step 1.2: Who do they give these outputs to?

The training team saw three distinct groups they provide their outputs to:

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Output	*Executives and Managers*	*Strategy Professionals*
Training materials for course participants	✓	✓
Training workshops	✓	✓

Step 1.3: Create "Customer Personas"

For both customer groups above, who the training team provide their outputs to, they created a Customer Persona to “bring these customers to life”:

Customer Persona	*Description*
Gaby Jensen 	Gaby is an Executive Director with a medium-sized business specialising in software for supply chain management. She has an intriguing balance between technical savvy and social collaborator, running a tight ship but never at the expense of great relationships. Her struggle can be getting caught up in too many exciting new ideas.
Peter Park 	Peter is the Strategy and Performance Manager in a not-for-profit organisation. He is mild-mannered and cares very deeply for helping people. He is very interested in change management and in engaging people in all stages of strategy development and execution. He can be a bit theoretical but he’s not too proud to keep working on his practicality.

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STEP 2: Narrow down the team's most important outcomes

Step 2.1: What matters most to customers?

The training team had been collecting data for many years from their "happy sheets", the survey forms they ask participants to fill out at the end of each course they ran. There were two questions in particular on those survey forms which provided a reasonably good source of information about what matters most to their customers:

- Q2: why didn't you rate overall value any HIGHER?
- Q3: why didn't you rate overall value any LOWER?

The training team used a 'word cloud' to quickly and easily extract a set of important service attributes from the gold mine of data in those two questions.

Firstly, they copied all the free text from the Q2 and Q3 responses into a word cloud. They did this using the free online tool at *www.tagxedo.com*. They knew a lot of the words in those questions would be irrelevant, so they excluded the obvious ones (like workshop, good, great, performance and so on). There is an option in tagxedo to do this quickly. This is the word-cloud that resulted:

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For the words that came up most prominently in the word cloud, the training team then searched for those in the free text of Q2 and Q3 of their survey data. The purpose was to get a context for each of these key words and then try and form service attributes from them.

For example, here is what they did with the most prominent of the word cloud's key words:

- For "useful" the dominant context was "the information was useful"
- For "process" the contexts were varied and many, so this was not likely a unique service attribute
- For "measures" the contexts were varied and many, so this was not likely a unique service attribute
- For "practical" the dominant context was "practical steps and techniques"
- For "lot" the contexts were varied and many, so this was not likely a unique service attribute
- For "information" the contexts were varied and many, so this was not likely a unique service attribute
- For "time" the dominant context was "enough time to learn and practice"
- For "implement" the dominant context was "ease of implementation in my organisation"
- For "work" the contexts were varied and many, and overlapped with other attributes already identified
- For "content" it seemed mostly a pseudonym for "information"
- For "tools" the dominant context was "tools to assist implementation"
- For "think" it was more like "I think that…" and therefore overlapped with other attributes already identified
- For "understand" the dominant context was "easy to understand concepts"
- For "examples" the dominant context was "examples I can relate to"
- For "organisation" the dominant context was "engaging my organisation to apply this"

At this point, the number of comments from their survey data that related to the key words in the word cloud reduced considerably. So they reviewed what they had so far:

1. the information is useful to me
2. practical steps and techniques
3. enough time to learn and practice
4. ease of implementation in my organisation
5. tools to assist implementation

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6. easy to understand concepts
7. examples I can relate to
8. engaging my organisation to apply it

These became their service attributes, and the basis for Step 2.2, measuring how well they are delivering them.

Step 2.2: How well is the team doing these things?

The training team constructed a new feedback survey for their workshop participants, adding in 8 new questions that were simple 7-point rating scales to quantify the importance and satisfaction of each of the 8 attributes of service. After a couple of months of running their training workshops, they looked at the results that came from several hundred participants:

Key	Attribute of Service	Satisfaction	Importance
1	the information is useful to me	5.61	5.75
2	practical steps and techniques	5.47	6.11
3	enough time to learn and practice	4.06	5.67
4	ease of implementation in my organisation	3.36	5.81
5	tools to assist implementation	3.78	4.75
6	easy to understand concepts	4.94	5.08
7	examples I can relate to	2.56	4.17
8	engaging my organisation to apply it	3.08	6.56

Step 2.3: What are the team's priorities?

To improve their performance, the training team needed to focus on improving how they can improve the ease of implementation of their training into their customers' organisations, and improve how their customers can engage their colleagues to apply the learning they bring back to work:

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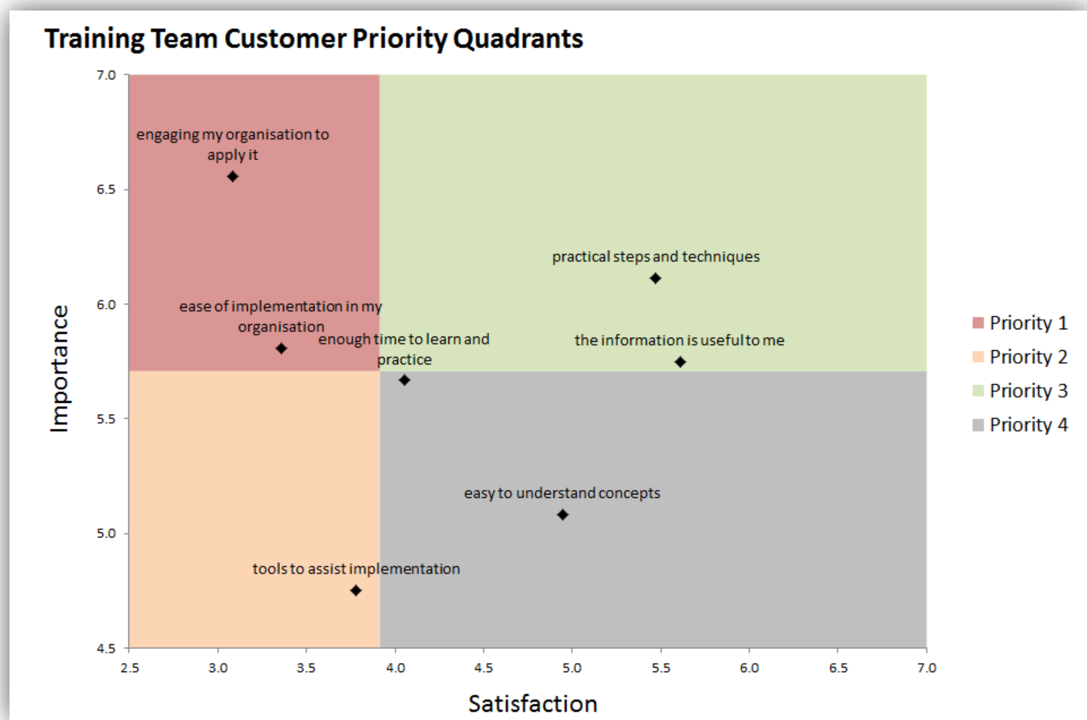

STEP 3: Uncover the team's points of highest leverage

Step 3.1: Outline the team's process

The training team’s training process is fairly consistent for each type of training they offer:

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Process name:	Training Delivery
Purpose:	To teach course participants how to develop business plans, and manage performance as they excute those business plans.
Owner:	Training Director
Start point:	Request from customer for tailored training course
End point:	Post-training report delivered to customer
Macro steps:	1. Formulate training outcomes with customer 2. Tailor examples and content for the training course 3. Deliver the training 4. Analyse feedback and provide report to customer
Process outputs:	• Training materials for course participants • Training workshops • Post-training feedback reports
Stakeholders:	• Customers • Venue and catering suppliers • Trainers

Step 3.2: Draw the cross-functional process

The process flowchart in more detail:

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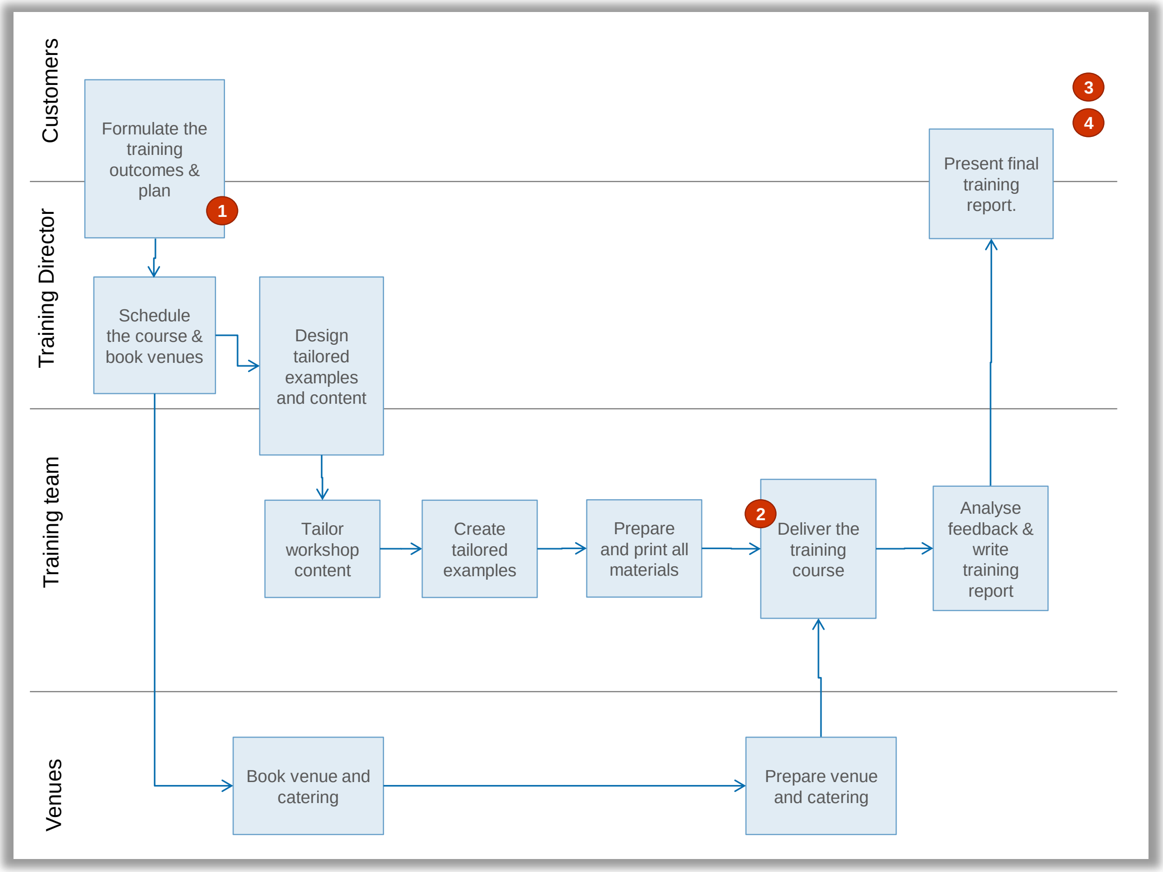

Step 3.3: Analyse the process for disconnects

The training team identified four disconnects they believe have highest leverage in helping their customers to have greater implementation success post-training:

1. Customers don't plan for how the training will be implemented after the training course.
2. Participants come to the training course without any immediate workplace application for what they will learn.
3. Participants return to work and get caught up in the whirlwind of their day-to-day work and leave it too long before they try and implement what they learn (and they start to forget).
4. Participants are not confident enough in their knowledge to lead their colleagues to apply it.

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STEP 4: Clearly map the team's most measure-worthy results

Step 4.1: Translate the process purpose into results language

After all their discussion about their customers' priorities and the leverage in their training process, the training team decided to change the purpose of their training process:

Process purpose	*Performance Results*
~~To teach course participants how to develop business plans, and manage performance as they excute those business plans.~~ To give businesses the know-how to choose the right results for success, and to work collaboratively to achieve those results.	Customers' business plans focus everyone on success. Customers achieve their business goals.

Step 4.2: Translate the customer priorities into results language

The customer priority attributes from the Customer Priority Quadrants translated into the following Performance Results for the training team:

Customer Priority Attributes	*Performance Results*
ease of implementation in my organisation	Customers successfully implement their learning to create business plans.
engaging my organisation to apply it	Participants engage their colleagues in business planning and performance management.

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Step 4.3: Translate the process disconnects into results language

<table>
<tr><th>Process Disconnects</th><th>Performance Results</th></tr>
<tr><td>Customers don’t plan for how the training will be implemented after the training course.</td><td rowspan="2">Participants come to the training course with an approved project to implement what they learn.</td></tr>
<tr><td>Participants come to the training course without any immediate workplace application for what they will learn.</td></tr>
<tr><td>Participants return to work and get caught up in the whirlwind of their day-to-day work and leave it too long before they try and implement what they learn (and they start to forget).</td><td>Participants implement their learning immediately following the training course.</td></tr>
<tr><td>Participants are not confident enough in their knowledge to lead their colleagues to apply it.</td><td>Participants leave the training course confident to lead their colleagues in implementation.</td></tr>
</table>

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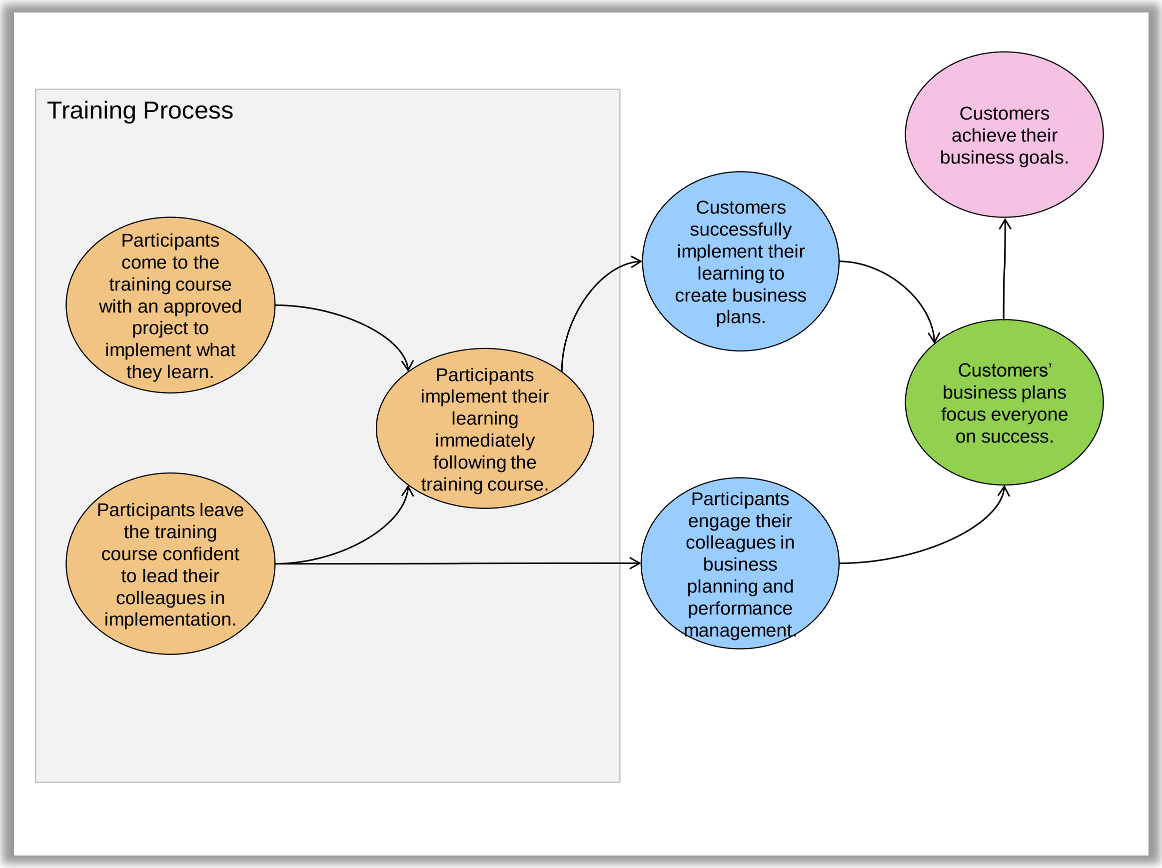
Step 4.4: Create a results map



STEP 5: Engage the team in designing their own measures

Step 5.1: Design measures for each result

The training team used the PuMP Measure Design template to find the best measures for their collection of Performance Results. PuMP is a performance measurement methodology. Read more at *http://www.staceybarr.com/pump*.

For example, the Measure Design for "Customers successfully implement their learning to create business plans" produced 2 performance measures:

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begin with the end in mind	Customers successfully implement their learning to create business plans.			
be sensory specific	• Participants have put everything they learned into practice within a few weeks following the course. • Participants in the course have fully applied their learning to their workplace assignment. • All participants who attended the course have new business plans, that meet all the requirements they learned at the course.			
find potential measures	*potential measures*	*strength*	*feasibility*	✓
	1. Percentage of participants who have implemented all steps learned at the course within 2 months.	M	H	
	2. Percentage of participants who have completed the workplace assignment they arrived at the course with.	M	H	
	3. Percentage of participants who have new business plans as a result of the course, within 2 months.	H	H	✓
	4. Average number of weeks participants take following the course to create new business plans.	H	H	✓
	5. Average number of taught requirements that are evident in participants' business plans.	H	M	✓
check the bigger picture	• Not sure if 2 months is the right timeframe for measure #3. • Not sure if measure #5 will prove to be useful since perfection of implementation is less important than amount of implementation at this stage.			

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name the measure(s)	Business Plan Creation Rate = Percentage of participants who have new business plans as a result of the course, within 2 months. Business Plan Creation Lag Time = Average number of weeks participants take following the course to create new business plans. Business Plan Sophistication = Average number of taught requirements that are evident in participants' business plans.

Step 5.2: Prepare the measures for implementation

The complete set of performance measures chosen for the reearch team's Performance Results are:

Performance Results	*Performance Measures*
Customers achieve their business goals.	• Business Goal Achievement Rate = Average percentage of business targets achieved by customers implementing what they learned at our courses.
Customers' business plans focus everyone on success.	• Customer Satisfaction With Success Focus = Average customer satisfaction rating with how well their staff and managers are focused on the success of the business.
Customers successfully implement their learning to create business plans.	• Business Plan Creation Rate = Percentage of participants who have new business plans as a result of the course, within 2 months. • Business Plan Creation Lag Time = Average number of weeks participants take following the course to create new business plans. • Business Plan Sophistication = Average number of taught requirements that are evident in participants' business plans.
Participants engage their colleagues in business planning and performance management.	• Participant Satisfaction With Engagement = Average participant satisfaction rating with how well their colleagues engaged in their implementation assignment.

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Performance Results	*Performance Measures*
Participants come to the training course with an approved project to implement what they learn.	• Implementation-Ready Participants = Percentage of course participants who bring an approved project to implement what they learn.
Participants implement their learning immediately following the training course.	• Participant Implementation Speed = Average number of days after the course that participants begin implementing what they learned at the course.
Participants leave the training course confident to lead their colleagues in implementation.	• Participant Confidence to Engage = Average participant satisfaction rating with how confident they feel about engaging their colleagues in their implementation assignment.

Next steps…

The next steps for the training team were to define the data and calculation requirements for their measures, and begin reporting them and using them in monthly team meetings.

About implementing performance measures…

This case study has demonstrated a process for how to identify what is worth measuring, specifically for hard-to-measure teams whose performance results or goals are not easy to define.

But **there are more steps in the performance measurement process** that follow on from selecting the performance measures, including sourcing the data, computing the measures, graphing them, reporting them and interpreting and using them to improve performance.

The PuMP Blueprint is a methodology to support this entire performance measurement process. When your team has successfully reached this point, **PuMP is a logical next step** for them. For more information:

http://www.performancemeasureblueprint.com/