A Dashboard for Learning

By Kevin Oakes

You rely on your car's dashboard to help you successfully operate your vehicle. T&d professionals are increasingly relying on Learning Dashboards to operate their learning initiatives successfully.

As the story goes, in the late 1990s Bill Gates was looking for a way to more easily monitor the performance of Microsoft on a daily basis. In an attempt to consolidate key operating results, he authorized an internal development project to give him a real-time, unified, graphical view into the results of the business. Mimicking the dashboard of an automobile, which allows you to see all of the key metrics of your vehicle at a single glance, the first "Digital Dashboard" for business was born.

That internal project was so successful and useful for the company that Gates began to show off the application to business executives around the world. A groundswell of demand occurred, and Microsoft realized that it needed to turn the Digital Dashboard into a marketable product. It did so in 1999, to much fanfare. And an entire market for digital dashboards was spawned.

Though such dashboards have focused primarily on providing business metrics for senior executives to gauge the health of the overall business, training and development professionals now have several choices for "Learning Dashboards" to gauge the impact and progress of their learning initiatives. Often lumped under the term "Analytics," many industry analysts believe this new technology is one of the most exciting in recent memory for the learning profession.

Personally, I think Learning Dashboards have the ability to be the number 1 asset for training and development professionals to meet the most elusive goal in the industry: tying successful learning programs to real business results.

Keep reading, please

Before you stop reading here, this isn't another article on the importance of Kirkpatrick's four levels. In my opinion, our industry is Kirkpatrick-ed to death. Frankly, most executives really don't have any idea what learning professionals are talking about when we gleefully announce that we are embarking on a Level 4 evaluation; I guarantee they have tuned out by slide 3 of that presentation. But show them a graph that goes up and to the right correlating the impact your learning program had on sales last quarter and, suddenly, you have an attentive audience.

In my February article, "A Seat at the Table," I outlined several reasons that learning and HR professionals generally aren't considered part of the core management team. That article generated more letters to the editor than any in the past year. Why? Well, clearly I touched a nerve. Linking learning to business performance has been more myth than reality—a pipedream for most training professionals. In that article, I said that one of the biggest reasons the "seat at the table" has been difficult to attain is that learning professionals rarely speak or think in the language of business, and they generally lack the expertise to provide the link to business metrics. But many have the desire to do both.

"In our research with more than 30 different training organizations in 2002, I found that the biggest reason that companies do not measure training more rigorously is that they don't have the experience, tools, and infrastructure to do so," says Josh Bersin, principal of Bersin & Associates. "It isn't lack of interest or importance, but rather lack of tools and expertise."

Learning Dashboards won't necessarily help individuals with the expertise needed, but they will provide a methodology and tool set to measure the progress and impact of learning initiatives. In a sense, they also can help people speak the language that executives want to hear—by condensing soft, nebulous topics and programs into hard, bottom-line results.

"The dilemma surrounding the ROI process is a source of frustration with many senior executives," says Jack Phillips, a recognized expert on measurement and evaluation. "Most executives realize that learning is a basic necessity when organizations are experiencing significant growth or increased competition. They intuitively feel that there is value in providing learning opportunities, logically anticipating a payoff in important bottom-line measures such as productivity improvements, quality enhancements, cost reductions, and time-savings. Yet, the frustration comes from the lack of evidence to show that the process is really working. While the payoffs are assumed to exist and learning programs appear to be necessary, more evidence is needed or funding may be adjusted in the future."

Why it's important
According to the latest ASTD State of the Industry Report, companies are spending from 2 to 4 percent of payroll on training. That represents a significant commitment of billions of dollars on training each year. Yet, only 12 percent of companies try to measure the business impact of that investment, according to the ASTD report.

"I think there are still too many 'training metrics' in organizations that are really only important to training organizations," says Darin Hartley, director of solutions development at Intrepid Learning Solutions. "I hope that one day, the term *learning analytics* goes away

and everyone in organizations will be using business analytics and business measurements to describe the effectiveness of learning interventions. I also hope that learning organizations measure what really needs to be measured and start the ROI-learning analytics process very early in the learning cycle, during the analysis phase of projects."
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"As I talk with training organizations throughout the world," Bersin says, "I find that many are not benchmarking themselves—primarily because it is hard to get the data they need. In fact, it's easy to find this information, and a training analytics program makes it even easier."
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Learning Dashboards are the bridge between measuring training for training's sake and measuring it to see the impact on what matters most to executives: increasing revenue, decreasing expenses, or improving cycle time.

What it is
Learning Dashboards provide users with an interactive, real-time visual display correlating training activities with business performance data. This data is usually linked to an organization's customer relationship management (CRM) system, its human resource information system (HRIS), or enterprise resource planning (ERP) platform. By integrating with

those enterprise-wide systems, training and development professionals can access key metrics to help make an impact in a particular division or function.

For example, with learning analytics an organization can
● empower sales managers with the ability to identify the impact of specific learning interventions on revenue trends, sales cycle length, pipeline activity, pricing, and deal closure rates. That can be used to gain vital insight into the skills and knowledge that distinguish top performers from mediocre ones.
● enable compliance professionals to monitor corporate adherence to regulatory mandates governed by organizations such as the FDA, OSHA, EPA, and other bodies. Aggregated dashboards and proactive alerts can help organizations avoid regulatory fines and increased costs that result from noncompliance.
● help individuals and departments adhere to internal best practices and operational requirements by monitoring certification of personnel. For manufacturing, industrial, and other kinds of companies, managers can gain insight into the effectiveness of training and certification efforts, and monitor days to certification expiration.
● provide customer support, marketing, and partner program professionals with real-time data on customer satis-

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faction and revenue results, and show how externally facing learning programs are affecting these critical measures.

- enable training professionals to better quantify the ROI on training activities and adjust programs in real time to optimize training strategies based on performance impacts.

Though that kind of linking has sometimes occurred in the past, it mostly has occurred after the fact, in lengthy analysis projects laden with surveys and many hours of manual labor. Learning Dashboards allow this analysis to happen in real time and as an ongoing activity, using existing systems instead of expensive people.

How it works

For many organizations, the tools to get started already exist. LMSs (learning management systems) generally contain the data that forms the basis of the analysis. Most analytics tools are designed to attach to an LMS and to import data from an LMS database, as well as from other systems. The analytics database, which is often referred to as a "data mart" or multidimensional database, is the repository where this data is aggregated. Once aggregated, the analytics engine provides a correlation between the two sets of information.

That correlation happens in the form of charting, which provides the visual element of the dashboard. A Learning Dashboard isn't a static view of the data; instead, it is a real-time dynamic view that usually enables the ability to drill down and see the underlying sets of data. That ability to drill data is a feature of OLAP, or "online analytical processing." OLAP technology is germane to most dashboards and provides much more detail than the standard reporting that most LMSs provide.

An analytics engine typically manages multidimensional "cubes" of data for

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analysis and provides rapid access to this cubed information. The system organizes data from a relational data warehouse into cubes with precalculated aggregation data to provide rapid answers to complex analytical queries. That gives learning professionals immediate access to interesting and relevant information on the success (or failure) of their programs.

The longevity of measurement

Some people in the industry have theorized that the need to measure "nonlinear" activities such as learning isn't long-lasting. One argument is that it's an obvious benefit to the organization so there's no need to spend energy and money on measuring it. Another argument is that, like email, it's too difficult to accurately measure the impact, so why bother.

"One thing is certain in the ROI debate: It is not a fad," says Phillips. "As long as there is a need for accountability of learning expenditures and the concept of an investment payoff is desired, ROI will be utilized to evaluate major investments in learning and performance improvement."

The growth of the learning professional is a major reason for the growth in popularity of analytics tools. "Today's CLO is more aware of bottom-line issues in the organization and more knowledgeable of operational and financial concerns," adds Phillips. "This new 'enlightened' manager more and more is taking a business approach to learning and development, with ROI as part of the strategy. Analytics tools are becoming a major component in making that strategy a successful one."

As learning professionals adapt to the

bottom-line realities of today's business, Learning Dashboards are becoming not just a tool for measurement, but also a tool in helping learning professionals gain that seat at the table.

Kevin Oakes is president of SumTotal Systems (NASDAQ: SUMT), the business performance and learning technology industry's largest single provider of technologies, processes, and services.

Look for ASTD's online learning dashboard, the WLP Scorecard, in January 2005. It will incorporate a standard set of metrics and reporting frameworks to monitor, evaluate, and compare the efficiency, effectiveness, and alignment of the learning function within and across organizations. Developed by an international Think Tank of experts from corporations and government agencies, the scorecard will generate a diagnostic profile on key financial, process, and human capital indicators along with prescriptions for improving the learning function. Over time, the WLP Scorecard will provide a robust database for research to explore relationships among variables in a predictive model of workplace learning and performance.