KRISTOPHER J. NEWBAUER

Aligning Instructional Design With Business Goals

Make the Case and Deliver Results

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To everyone I've had the pleasure
of learning from and teaching over the years.
You've all inspired this book and helped me
become a better learner, teacher, and person.

And especially to my mom and dad,
who have always encouraged me to be me
and to always pursue my dreams.

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Foreword

Not everyone enters the talent development (TD) profession with a relevant undergraduate or graduate degree. Rather, they end up in talent development by happenstance—many are promoted from within their organizations to help launch organized training, organization development, career development, or the myriad other activities generally covered under the banner of talent development. Some people who are promoted into talent development pursue professional certifications in the field, such as the Association for Talent Development's Certified Professional in Talent Development (CPTD).

But the need remains to give newcomers to the field—and even some old-timers in the field who never got a proper orientation—a broad-brush introduction to the profession, what it seeks to accomplish, how it should be positioned in an organization, and how it should identify and pursue its purpose.

This book provides a solid foundation to review what the talent development profession is, how to align talent development in the organization with business needs, how to build support for it in organizations, and how to carry out the most important activities traditionally handed to the talent development function.

This book is the primer I wish I'd had when I began my own career in talent development as a trainer for the state of Illinois in 1979, before later moving on to manage talent development in a large insurance company. By stimulating meaningful self-reflection, it will help my many students who are starting out or at midcareer and are reflecting on what they want to do.

I met Kris through our mutual work with the International Accreditors for Continuing Education and Training (IACET), the successor organization to the U.S. Department of Education task force that developed the continuing education unit. Accreditation is key for ensuring quality organizational talent development efforts and programs, and Kris has been a leader in that organization; he served as the chair of the organization's board of directors while writing this book. Kris has also been involved with research projects sponsored by IACET in partnership with ATD on instructional design and evaluation, and we have both spoken at numerous ATD conferences, together and separately.

Kris has done an outstanding job of providing a practical primer for talent development professionals who need to hit the ground running in an increasingly demanding field where skilling, reskilling, and upskilling workers are challenges facing organizations and nations. I highly recommend this book to anyone who works in talent development.

—William J. Rothwell, PhD, DBA, SPHR, SHRM-SCP, CPTD Fellow, President, Rothwell & Associates; Distinguished Professor, Workforce Education and Development, The Pennsylvania State University

Introduction

To design great learning programs, you need to focus on the desired impact on your company. To home in on impact, you need to speak the language of business. And to speak the language of business, you need to speak the language of money. That's right—it's all about the money.

The good news is that reframing the work you do to put out valuable instructional design content can be accomplished with a few concrete steps—not at the expense of the people you entered this profession to serve in the first place.

Consider this example: A graduate student of mine several years ago worked as the principal of a local public school. As part of an assignment in their graduate course on measurement and evaluation in HR development, the students were required to reframe a course's purpose statement into a business goal to evaluate the impact of a talent development (TD) initiative. This student initially rejected the challenge, suggesting it was impossible to get to the language of business—*money*—in the realm of public education.

My challenge, of course, was to help her get there, even for a not-for-profit municipal school. After all, every legitimate organization requires financial viability to exist, whether it relies on donations, government funding, or profits. So, we must accept that it's possible to reframe course purpose statements as real business goals. Thomas Gilbert, a psychologist who founded the field of human performance technology, postulated that virtually everything can be measured. He suggested that we focus on worthy accomplishments rather than behaviors that lead to them. That is precisely what I suggested to her, and what I suggest you do with respect to the curriculum you design.

To assist my student in getting down to the money, I posed a question—the first why of several: "Why is it important that teachers *can* prepare students for standardized testing?"

"*Why* is *that* important?" she replied, as if I had just asked the most absurd question.

"Yes, why is it important for teachers to prepare students for standardized testing?" I asked.

She said, "Our students' standardized test scores have declined over the past couple years, and they need to improve. That's why the teacher training program is so important. It's meant to better prepare teachers to ensure students are prepared for and can pass state tests."

"OK, good," I said. Now for the second why; I asked, "So why is improving standardized test scores important?" Again, I was met with a look that suggested I should just inherently know why, but I wanted her to be able to articulate it so she could see that she was capable of getting to the business goal related to money, even for a public school.

"Because we're getting bad press over it," she said. "The school's reputation is being called into question. As a result, parents are taking their kids out and transferring them to other schools. And good teachers are leaving to go work for schools with higher test scores."

We were getting closer. Now for the third why; I asked, "Why is losing students and teachers a bad thing for the school?"

"Because our state funding is dependent upon the number of students who actively attend the school! The more teachers we lose, the more students we lose. The more students we lose, the more money we—OK, *now* I see where you are going with this!"

Aha! In just three "whys," we reframed the course purpose statement into a business goal using the language of business. Consider the difference between *demonstrating a change in teacher behavior* (the original course goal) and *committing to an increase in state funding, thereby increasing the school's revenue*, because of the program. Which argument do you think is more compelling to a school superintendent? This exercise applies to both public education and corporate learning, and across industries to all types of TD initiatives. What this book will do is help you go from communicating your TD-focused objectives to communicating ones that matter and are compelling to your stakeholders.

The Importance of Stakeholders

I want to stress how transformative it can be for you to keep the end goal in mind (the money), collaborate with your stakeholders to arrive there, and tailor your impact to those who matter most. An important lesson I learned in my career was how to identify, prioritize, and engage stakeholders in establishing and agreeing upon evaluation criteria that will be used to inform successful instructional design content.

I completed an undergraduate degree in secondary education and spent a brief time teaching at two high schools in western Michigan before eventually landing a corporate job in employee training and development. When I took my first HR role as a training specialist on a training team, I had no formal experience in training adults. However, I felt absolutely comfortable designing curriculum because I had regularly designed lesson plans that explicitly aligned to state curriculum standards.

In both experiences, though, I wondered if instructional design alone was the best measure of my success as a teacher and subsequently as a training specialist. Was it sufficient to simply know I had designed, developed, and implemented curriculum that satisfied established education standards? How *should* I evaluate my own success as a teacher? That was my first real personal inquiry into measurement and evaluation.

I found myself attempting to evaluate my teaching performance from several perspectives: how students might evaluate me, how parents might evaluate me, how school administrators might evaluate me, how community employers might evaluate me, and how I might evaluate myself. It grew increasingly clear to me that a plethora of stakeholders had a vested interest in my performance as a teacher. All of these stakeholders were important, but was one more important than the others? Was one dependent upon another? How would I balance competing expectations from various stakeholders? How would I manage the expectations of all stakeholders, knowing I couldn't possibly satisfy everyone equally? This is one of my first recollections of having to identify stakeholders and understand their interests in and influence over my work. As with any evaluation, it highlighted the need to understand not only who the various stakeholders were, but also their expectations of a successful teacher and the evaluation criteria they might use to determine it.

From the students' perspectives, likability and relatability were clear requirements, but these were merely student *reactions* to me as a person—Level 1 of the five levels of evaluation framework (which I discuss in chapter 6)—not necessarily measures of how effective I was as a teacher. Having once been a high-school student, I understood that they wanted to feel respected, to be set up for success, and to feel like they mattered. Being only a few years older than the students I was teaching at the time, I decided to ignore the school's faculty dress code and instead wore jeans to class every day. My jeans and T-shirts may not have been deemed professional or even appropriate by school administrators, other teachers, parents, or community taxpayers, but dressing like my students helped remove an unnecessary barrier between us. Although their reactions to me would not determine how successful I was, I understood that if I couldn't even get them to *react* or respond to me, I would have even more difficulty getting them to *learn.* The lesson for me was not to discount the importance of students as stakeholders, even if their primary measures of success for me were their reactions, and even if earning their favorable reactions meant breaking long-standing rules.

In addition to adapting how I dressed, I also quickly understood that I needed to speak their language. So, at the beginning of each class, I devoted time for students to teach me their contemporary slang. They invited me into their subculture by sharing their language, which helped me understand what they were talking about and helped me speak in a way that connected to their interests. This is one of the most important lessons I learned, and it's one of the most important pieces of advice I offer to others now: Learn to speak the language of the audience with whom you're attempting to build rapport and credibility.

Learn to speak the language of the audience with whom you're attempting to build rapport and credibility.

It also dawned on me that aligning the course curriculum with state education standards and measuring learning through test scores alone wouldn't be sufficient. A real measure of my effectiveness and success transcended how much learning occurred in the classroom. I needed to prepare students for real-world application, so in my civics class, I invested in helping them become law-abiding, well-informed members of society who understood due process and the rule of law.

Since my days of teaching in a high-school classroom, I've acquired formal education in and experience with adult learning. I completed two graduate degrees in HR: one in HR management (traditional HR) and one in HR development (another way of saying *talent development*). I have earned and maintain several professional credentials in HR, talent development, and performance improvement. Even so, the lessons I learned in those high-school classrooms—identifying stakeholders, understanding their expectations, and doing everything I could to win over their hearts and minds and change their behaviors—continue to have tremendous implications for my career and life. This book will teach you how to do the same with your stakeholders. Learning to attend to the motives and expectations of all of your stakeholder groups can prepare you to make the case and deliver results.

The Making of a Book

The idea for this book was inspired by the same graduate course I discussed in the opening story. When I reviewed the business challenges my graduate students were attempting to address through their instructional design packages, I found them to be incomplete. Rationales such as "reduce turnover," "reduce errors," or "teach *XYZ* skills" without ever getting to *why* they are important will not consistently lead to effective results. That's when I realized that I needed to help others think like business leaders and understand the importance of establishing evaluation criteria up front that would inform their instructional design.

My wish for my students is my wish for you: If I can help you understand how to design and develop TD initiatives that achieve explicit, mutually agreeable business goals, you will:

- Create stronger, more effective instructional design packages.
- Understand the business you support.
- Demonstrate the value you add to the business.
- Be recognized as critical to business success.

This book will be particularly relevant for the following TD professionals:

- **Instructional designers and individual contributors.** This is primarily a book focused on rethinking the way TD professionals design instruction using evaluation. It helps you consider what knowledge, skills, and attitudes are necessary for achieving business goals, and it provides strategies for measurement and evaluation that help prove meaningful learning. Although this book isn't a measurement and evaluation text, it can help enhance partnerships between measurement and evaluation specialists, instructional designers, and business leaders.

- **TD leaders.** Although, practically speaking, this book funnels its strategies into instructional design, it also encourages talent development leaders to collaborate with business leaders and reimagine the TD function to ensure that learning is aligned with business goals. It offers ideas for restructuring your learning portfolio, exploring business needs and whether learning is appropriate to address them, aligning with various stakeholder groups, and measuring the output of your function to add the most value possible to your enterprise.

Everything I do in talent development relies upon understanding the business I serve and speaking the language of business. TD professionals who understand business goals will design, develop, and implement more meaningful TD initiatives when they keep evaluation in mind. The processes and tools I use to accomplish meaningful learning programs that add real value and deliver results have made my professional life both easier and more successful, and I am confident they will work for you, too.

In This Book

This book is organized into two parts that encourage TD professionals to use measurement and evaluation techniques to inform their instructional design content.

The first part of the book, "Foundations for Making Your Case," discusses how you can develop business acumen, align with your business leaders, and make your case as a valuable, integrated part of business success.

Chapter 1 approaches talent development as a critical business development partner. It explores how TD initiatives are intended to change behaviors that produce necessary business results, and offers a model for changing peoples' behaviors to produce those results. It explores an updated version of ADDIE that prioritizes evaluation criteria to inform learning objectives.

Chapter 2 focuses on identifying, prioritizing, and engaging your stakeholders to ensure maximum success. It offers several approaches to conducting stakeholder analyses.

Chapter 3 considers how to get buy-in for your TD initiatives. It proposes a new or reimagined TD function that's better positioned to produce meaningful initiatives.

Chapter 4 focuses on building business acumen. It addresses the language of business as a way to build rapport and establish greater credibility with business leaders. It approaches course goals from the perspective of business results to change the way learners think and feel about talent development. It differentiates between *outputs* and *outcomes* in ways that help you identify the real value your initiatives add to the business.

The second part of the book, "The Eight-Step Evaluation-Focused Instructional Design Framework," explores how to better align your initiatives with the business. The framework's eight steps emphasize the importance of collaborating with business leaders and other stakeholders in everything you do to maximize the value you add and to be seen as essential to the success of the business.

Chapter 5 walks through the first two steps: Identify a business challenge and translate the business challenges into a business goal. These steps focus on conducting a needs analysis and establishing evaluation criteria. Proactively identifying business needs, understanding root causes, and closing performance gaps are all considered.

Chapter 6 covers the next two steps: Determine if learning is an appropriate strategy for achieving a goal and determine what successful learning looks like. Both focus on establishing evaluation criteria that are used to inform your instructional design content. This chapter uses the five levels of evaluation as the framework for evaluation criteria.

Chapter 7 covers the remaining steps of the process: Determine what knowledge is needed to achieve the business goal, determine what skills are needed to achieve the goal, use needed knowledge and skills to inform course objectives, and, for each course objective, design and develop learning activities. These steps are all geared toward finally designing and developing your learning initiative. This chapter addresses determining the knowledge and skills necessary to change learners' behaviors to produce results, identifying course learning objectives, and designing course activities intended for learners to demonstrate their proficiency.

I hope you can engage with the content in this book as action learning by applying the process I share to a real challenge facing your business. I want to empower you to define evaluation criteria that inform initiatives that contribute to your business's success.

PART 1

FOUNDATIONS FOR MAKING YOUR CASE

The first part of this book focuses on how you can position your TD function for success. It's vital that you understand the business you serve as well as you understand talent development. When you demonstrate your understanding of and commitment to your company's core competencies, you build credibility and trust with business leaders. Learn how you can contribute to real business results by intentionally changing behaviors—something you're already in the business of doing. Also explore how identifying, categorizing, prioritizing, and engaging stakeholders is critical to the success of your initiatives.

Chapter 1

Talent Development as Business Development

I used to consider myself an educator, not a businessperson. I didn't study business. I didn't have a desire to lead or own a business. I wasn't motivated by money or the prospect of getting rich working in business. I found peace and comfort in thinking and feeling that being an educator was a more noble, selfless occupation—one that existed to make a difference in the lives of others for the betterment of society and humankind. That is how I thought and what I felt . . . and it was fulfilling! However, I have since come to recognize the importance of being business-minded by changing how I think about the role of money, which changes how I feel about the role of talent development as a *business* function—not just a *people* function—which changes how I approach my work as a TD professional.

A basic premise of this book is that TD professionals still must convince business leaders of the value talent development adds, and that is because in many companies and organizations talent development is still not considered part of *the business*. Rather, it's often considered a support or enablement function, along with IT, finance, legal, and HR. Over the years, as talent development grew into its own established profession, that evolution may have perpetuated the divide. Although establishing talent development as a distinct profession has, in many ways, legitimized our place in the world of work, it may have also resulted in our work being perceived by those in the business as *nice to have* rather than *essential*. Because we're not always seen as part of *the business*, we're not always included in addressing business problems or opportunities, such as how to fix declining revenue or expand into new markets. However, by homing in on the goals of your business, applying what you already know about behavior change, and rethinking the process you use to launch TD initiatives, you can become essential to the business you support.

A Case Study in Retail and Revenue

While working on my secondary education degree, I managed a Harry & David store, an upscale gourmet food and gift retailer, on Chicago's Michigan Avenue—the "Magnificent Mile." When I took over the store, it was a total mess. It was understaffed. Absenteeism was a regular occurrence. There was more inventory in the stockroom than on the sales floor. Signage was outdated and incorrect. There had been very little upkeep. As I trained the staff and worked with them to turn the store around (we began to regularly appear on the list of top-performing stores in the region), I started to understand that *it's all about the money*.

Nothing had changed about our products, price points, foot traffic, location, advertising, or marketing. (Although, we were literally spending hours before opening and after closing each day on our hands and knees cleaning the floors and fixtures and making the store bright, clean, and fun!) I admitted to corporate executives that I wasn't focused on increasing revenue, which was a naive, albeit honest, sentiment. Rather, I took over the store with an intrinsic desire to assemble a team of engaged colleagues who cared about our collective success and had fun doing the job, make the best of my time there by building rapport with customers, and walk out at the end of each day feeling accomplished and proud. I wasn't there to sell products, but engaging and empowering staff resulted in customers spending more money. So, there seemed to be a collateral benefit to this approach.

I hired new sales associates and reengaged the existing staff. I convinced the team to join me in creating a great experience for everyone, and they rose to the occasion. None of us were focused on revenue, yet our sales continued to grow and grow. The more revenue the store brought in, the more payroll budget I had available to offer employees more hours. The more hours my colleagues could work, the more our store improved and the more potential they had for taking home more money. The more we continued to improve and the more they worked, the more I was able to increase their pay. It was all interconnected. When we improved one thing, it influenced another, and the outcome of our work reinforced our behaviors.

So what happened to turn that store around? I focused on the people: *employees* and *customers*. These were the stakeholders I was determined to prioritize and engage. And when I did, the money followed.

When I began working at Rotary International on its TD team, my role wasn't revenue oriented or focused on money. I struggled because when I left the office each day, I had no real way to know or measure the impact I was making. This was a sharp contrast to working in retail, when not a day went by that I didn't know how the store was performing from a sales perspective. I had learned from retail that the better a company or organization performs financially, the better the conditions can be for the people—the *stakeholders*. It suddenly clicked how important being business minded was. I realized that if I wanted to continue to care about making a difference in the lives of others, I needed to become an astute businessperson.

If you came to the profession wanting to make a difference in the lives of others, then the best way to do that is acting like a businessperson first and a TD professional second. If, like me, you have very little interest in participating in the profit-generating arm of your organization, I hope to make a case to you that your professional life will be easier and more fulfilling if you can change the way you think and feel about money when it comes to producing instructional design content.

Making Your Case

Each year, companies and organizations around the world invest billions of dollars in TD initiatives for their employees, customers, members, and volunteers. The purpose of these initiatives is for learners to acquire, maintain, or improve competencies with the express intention of changing their behaviors to achieve a desired business strategy.

Unfortunately, some business leaders view and treat the TD function or TD initiatives as expenses—*cost centers*—rather than as investments. This can be a tremendous source of frustration for us. How do we get business leaders to consider our activities necessary investments? How do we convince them that such activities are essential to helping the business achieve desired results?

The mere fact that we struggle with the answers to these questions highlights an important reality: We often approach this dilemma from an us-versus-them perspective. How do *we* get *them* to recognize the importance of TD activities? How do *we* get *them* to view TD activities as investments rather than expenses? This conflict suggests that business leaders might not fully appreciate talent development, and that practitioners may not fully understand the business. It presents an opportunity for us to be perceived by business leaders as *business partners.*

To establish credibility with business leaders and have talent development seen as a legitimate discipline in business management, it's imperative to reconsider the role of measurement and evaluation in your work. One of the challenges for the TD profession is that evaluating a training program's impact is often an afterthought, considered only after training has been conducted, or it gets overlooked altogether (even though evaluating the impact of TD initiatives is a core part of ATD's Talent Development Capability Model). For business leaders who are accustomed to relying upon metrics that measure the success and failure of business initiatives, the usual TD metrics (such as the number of training courses offered and the number of learners who completed courses) are insufficient. They're measures of output, not outcomes. The most powerful metrics are those that help us understand impact. As TD professionals, we need to ensure we're skilled at measuring what matters and use evaluation data to tell the story of the value we add.

As TD professionals, we need to ensure we're skilled at measuring what matters and use evaluation data to tell the story of the value we add.

In my experience working with hundreds of TD graduate students, it's clear that measurement and evaluation is perceived as the least glamorous TD activity for a lot of practitioners, and many avoid it completely. I would argue, though, that it's one of the most critical activities to ensuring that everything else you do (designing, developing, and delivering initiatives) makes a difference in the success of the business you support.

One way to promote measurement and evaluation is to position it as critical to instructional design. Doing so renders it essential rather than optional. The following eight-step Evaluation-Focused Instructional Design Framework does just that and will be the focus of part 2 of this book:

1. Identify a business challenge.
2. Translate the challenge into a business goal.
3. Determine if learning is an appropriate strategy for achieving the business goal.
4. Determine what successful learning looks like using four of the five levels of evaluation.
5. Determine what knowledge is needed to achieve the business goal.
6. Determine what skills are needed to achieve the business goal.
7. Use identified knowledge and skills to inform course objectives.
8. For each course objective, design and develop learning activities.

Notice that step 4 requires you to establish evaluation criteria before creating a curriculum. Although we will not (and cannot) know the results of TD initiatives until after they've been implemented, we can be more intentional about how we design, develop, and deliver initiatives so they're more likely to produce desired results. After all, in some cases, poorly implemented TD initiatives can be more damaging to organizations than if there had been no initiative at all, especially if they compromise business leaders' and employees' perceptions of the TD function or TD professionals.

In business process management, any business processes or procedures that don't yield results greater than the worth of their efforts are considered a waste. That's true with TD initiatives too. There is great danger in implementing TD initiatives that don't culminate in positive, intended change. Doing so can create the unfortunate impression among business leaders that talent development doesn't add value to their business and perhaps even detracts from it.

You must collaborate with business leaders to identify business challenges, which could be existing problems, such as declining revenues, or desirable opportunities, such as expanding the business into a new market. (Throughout the remainder of this book, business problems and opportunities are collectively referred to as "challenges.") Both parties need to agree that such a challenge is a priority for the business. You must understand the conditions of the challenge, including what caused a problem or what prompted an opportunity; the potential impact on the business; the possible implications of not addressing it; what its absence might lead to; and so forth.

This is an iterative and collaborative process between you and your business leaders that needs to result in a shared understanding of the challenge and an agreement about its causes. If such agreement is lacking, any subsequent TD initiatives would likely be futile because they would address the challenge from a single, incomplete perspective. Unfortunately, failed TD initiatives compromise the reputation and integrity of talent development, both the function and the people dedicated to it.

Unfortunately, failed TD initiatives compromise the reputation and integrity of the talent development function and the people dedicated to it.

Because identifying business challenges is such a critical component, it's essential that you be skilled at it. We'll focus more on identifying business challenges and translating them into business goals in chapter 5. For now, though, let's assume that a business challenge has been identified, and there is a shared understanding of what it is and agreement around its causes. Once those conditions have been met, you must collaborate with business leaders to determine what needs to happen to address the challenge. You need to understand how people's thoughts, feelings, and actions (or behaviors) need to change to achieve desired results. To understand how the ways people think about, feel about, and do things are operationalized from a learning perspective, we'll explore a Think→Feel→Do Framework aligned with learning domains.

For example, a manufacturing company with the business challenge of increasing market share and revenue by introducing new products will likely train its sales force on product features, benefits, and proper use. It might also provide training or some form of self-guided, just-in-time learning content (such as job aids) for consumers on how to use the new products. Both are intended to result in people doing something new or differently. The more that people understand and appreciate product features and benefits—and the better they are at using the products—the more likely it is that the business will achieve its goals. This positions the company for increasing its market share and revenue.

Many practitioners in our field enter the discipline in unconventional ways, as I did. For those with business experience, the technical skills necessary to be successful in talent development might be brand-new. And for those with TD experience, the business skills necessary to be successful may be relatively new. Not convincing business leaders of the value that TD initiatives contribute toward achieving business goals can be one of the biggest, most insurmountable barriers to our success, and perhaps the success of the business. This book focuses on how you can win over business leaders' minds (how they *think*) and hearts (how they *feel*) by linking TD initiatives to evaluation criteria that define desired results.

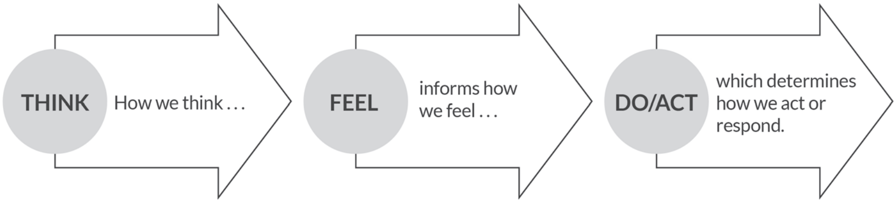
Changing Behaviors

The work you do is all about designing initiatives that result in a behavior change, which ultimately results in improved performance outcomes that achieve desired business results. It's helpful to keep theories for behavior change top of mind because they not only inform your instructional design content but are also useful for changing the minds of your business leaders with respect to the value you add.

The Think→Feel→Do Framework

TD initiatives are based on the premise that how people currently *think* about, *feel* about, and *do* something is insufficient or ineffective for achieving a business goal. Such achievement requires changing behaviors. In both a current and future state, how someone *thinks* about something informs how they *feel* about it, and how they *feel* about it informs what they *do* in response. This Think→Feel→Do Framework (Figure 1-1) can help you understand how to change behaviors to achieve desired results.

Figure 1-1. The Think→Feel→Do Framework



When it comes to long-term, sustainable behavioral change, it's important that your initiatives address changing not just what people *do* but also how they *think* and *feel.* This is often done with one-on-one coaching. Consider the example in Figure 1-2.

Figure 1-2. Example of Think→Feel→Do

If we want to change our behaviors and actions toward our colleague, rather than preserving the initial thoughts and feelings that prompted us to avoid our colleague, we need to reframe them, as in Table 1-1.

Table 1-1. Reframing Behaviors

	Starting Posture	Reframed Posture
Think	My colleague is often abrupt and short with me, which leads me to believe they don't care for me or respect me.	My colleague is very busy working on projects for the team and doesn't have time to interact with me the way I would prefer.
Feel	I feel unimportant, unappreciated, and disrespected, which makes me uncomfortable and sad.	I feel grateful to my colleague for ensuring the success of our team, and I appreciate and admire their dedication and hard work.
Do	I avoid my colleague so I don't have negative experiences.	I offer to help my colleague.

In this example, simply changing the way you *think* about your colleague results in changing how you *feel* about that colleague, which in turn changes your behavior toward that colleague. Notice that while you focused on changing your own behavior rather than attempting to change your colleague's behavior, you might also experience a change in your colleague's behavior because of the change in your own behavior.

If we apply the Think→Feel→Do Framework to the thought offered earlier in this chapter that measurement and evaluation is likely the least preferred and performed TD activity, you can reframe your avoidance or fear of measurement and evaluation, as in Table 1-2.

Table 1-2. Reframing Measurement and Evaluation

	Starting Posture	Reframed Posture
Think	Measurement and evaluation is difficult, and I prefer to deal with people rather than data.	Measurement and evaluation is the best way to ensure that the work I do demonstrates to business leaders the value I add to achieving business results.
Feel	I worry that data might not demonstrate or prove that my work contributes in any meaningful way, so I would prefer to focus on the core work of designing, developing, and implementing TD initiatives.	I accept that data can help me understand what I need to do to improve the value I add.
Do	I avoid measuring anything more than learner reactions (Level 1) and learning that occurs during TD initiatives (Level 2).	I work diligently to design, develop, and implement TD initiatives that are created with the end in mind so that measurement and evaluation becomes much easier and tells a compelling story of the value added.

Simply focusing on changing peoples' actions without addressing the thoughts and feelings that produce those actions might result in unsustainable, temporary change. Consider weight-loss programs. People who make immediate changes to their actions (what, how, and when they eat) without any consideration to how they think or feel about food, nutrition, and health are unlikely to sustain any changes in their long-term behavior. This is one of the reasons many diets fail: They result in short-term behavior changes without addressing the dieter's underlying thoughts and feelings.

Telling people to change their behavior is insufficient for producing long-term behavioral change. In psychology, *behaviorism* is the theory that human and animal behaviors can be conditioned, or changed, without addressing thoughts or feelings. Behaviorism suggests that actions can be manipulated through rewards and punishments. For example, we might manipulate children to clean their bedroom through a promise of a reward or a threat of punishment, as shown in Table 1-3.

Table 1-3. Reward and Punishment

Action	Reward	Punishment
Clean bedroom	Receive allowance payment	Get grounded; cannot go outside and play with friends until the bedroom is cleaned

Notice that this example focuses only on changing observable actions, with no substantial or intentional change to how children think or feel. Rather than relying on rewards and punishments to condition actions, we might create more sustainable, long-term behavior change by appealing to the way children think and feel about cleaning their bedrooms (Table 1-4).

Table 1-4. Reframing Reward and Punishment

	Starting Posture	Reframed Posture
Think	Bedrooms are for sleeping, so cleanliness is unimportant.	Cleanliness is an important life skill. People associate cleanliness with organization and organization with success.
Feel	I don't mind having a messy room. I'd rather spend my time doing things more fun than cleaning.	I feel energized and compelled to clean. Being organized is satisfying.
Do	Do nothing and leave my room messy.	I'll clean my room and keep it tidy.

It might seem far-fetched that changing the way we think and feel about a given subject, idea, or experience can have a drastic impact on how we act. I have learned how powerful it is not because I conducted research or read scientific studies about it, but rather because I practice it every day in my own life to change my actions by reframing negative thoughts.

To illustrate this, I offer a personal example about a time I was expecting an overseas package to be delivered on a promised date. I waited with excitement and anticipation all day. After the expected delivery timeframe passed, I received a notification from the courier that they were unable to deliver the package that day. They informed me they were sending the package back to the delivery hub and would attempt delivery the following day. My first *thought* was that the courier had lied to me and was a terrible company. That thought resulted in me *feeling* disappointed, frustrated, and angry. Those feelings made me want to contact the courier, which would likely have wasted my time and theirs because it wasn't going to get the package delivered to me any sooner. Instead of placing that call, I decided to use my time and energy on reframing how I thought and felt about the situation. I had just spent a full day waiting for the package. The anticipation had brought me happiness and joy. Now that I had to wait yet another day for the package, I'd been given an opportunity to experience another day of anticipation and excitement. That new thought reframed my feelings. I felt relieved, happy, and excited. Those new feelings changed the way I acted—I didn't place an angry call to the courier. Just changing the way I thought and felt about the situation completely changed my mood and behavior. The lesson for me was that I cannot find happiness until I can find gratitude and joy in the pursuit of it. Otherwise, I'll always be chasing after something, which will prevent me from being present in and fully appreciating every moment.

The Three Learning Domains

We can align the Think→Feel→Do Framework with the three classic learning domains. All TD initiatives should address sustainably changing the way people think about (*cognitive* domain), feel about (*affective* domain), and do something (*psychomotor* domain) in the intentional pursuit of achieving a business goal. This, in turn, demonstrates the true value talent development brings to businesses and organizations.

For people's behaviors to change, existing behaviors need to be replaced with new ones. This is where you come in. Once you determine what new behaviors will enable the achievement of desired business results as part of needs assessment work, you can then design, develop, and implement initiatives that equip learners with the necessary knowledge, skills, and attitudes that correspond to the three primary learning domains:

- **Cognitive**—the way people think; what they know; knowledge
- **Affective**—the way people feel; attitudes
- **Psychomotor**—the way people do something; skills

Although these three learning domains were originally intended for traditional primary education, they've been co-opted by the TD profession, particularly as they relate to establishing course learning objectives for instructional design. (You can learn more about the three domains in Appendix A.) In the HR realm, these domains are often referred to as *knowledge* (cognitive domain), *skills* (psychomotor domain), and *attitudes* (affective domain), or KSAs (Table 1-5).

Table 1-5. Learning Domain Terminology

Framework	Learning Domain	Also Known As
Think	Cognitive	Knowledge
Feel	Affective	Attitudes
Do	Psychomotor	Skills

These learning domains provide a framework for writing course learning objectives, which is covered in chapter 7 as part of step 7 of the eight-step Evaluation-Focused Instructional Design Framework.

I remain optimistic that I can change the minds and hearts of my fellow TD professionals regarding measurement and evaluation, and I am dedicated to demonstrating how rethinking the role of measurement and evaluation can completely revolutionize how we approach adding value to the businesses we support. When we can join forces with business leaders and gain and build their commitment to attaining business results by defining and agreeing upon the metrics and measures to determine outputs and outcomes, we then have a framework to design and develop initiatives that deliver results.

Reimagining ADDIE

One way you can demonstrate your business acumen and your commitment to evaluation is to reimagine ADDIE, the framework inspired by a five-phase approach (analysis, design, development, implementation, and evaluation) to instructional design, developed by the United States Air Force (1993). That said, there is always room for adaptation, and the approach I use separates and disperses the *E* of ADDIE—evaluation—into three parts: E_C, which involves establishing evaluation criteria; E_I, which involves creating evaluation instruments; and E_E, which involves executing the evaluation of a training course. The reimagined ADDIE framework presented in this book includes the following phases:

- **A:** Analysis
- **E_C:** *Evaluation criteria*
- **D:** Design
- **E_I:** *Evaluation instruments*
- **D:** Develop
- **I:** Implement
- **E_E:** *Evaluation execution*

With this framework, you can use the evaluation criteria as an instructional design blueprint for designing, developing, and implementing meaningful learning programs.

Analysis

This first phase is an information-gathering inquiry phase, which you'll do in steps 1, 2, and 3 of the eight-step Evaluation-Focused Instructional Design Framework. You collaborate with business leaders to identify business challenges and determine how best to allocate people and resources to address those challenges. The analysis phase may involve several different analyses, including but not limited to business analysis and diagnostic analysis (root-cause and gap analyses), which are covered in more detail in chapter 5 and pertain directly to business results. Instructional designers should consider other analyses when analyzing training needs, such as a work-setting analysis, context analysis, and learner analysis.

Evaluation Criteria

During this phase, which you'll execute in step 4, you use the information collected and knowledge gained during the analysis phase to collaborate with business leaders on the measures, metrics, and targets that you intend to use to evaluate the success of a TD initiative. As part of the eight-step Evaluation-Focused Instructional Design Framework, evaluation criteria will be established for four levels of evaluation: reaction, learning, behavior or application, and results or impact. You'll use these criteria to determine training design content and to inform the design and development phases.

Design

Once you have completed the analysis phase and defined your evaluation criteria, you can propose the design for a TD initiative intended to address the business challenge identified in the analysis phase, which will happen in steps 5, 6, 7, and 8. The output of the design phase is a design outline that addresses the objectives of the initiative; what knowledge, skills, and attitudes will be addressed; what activities you will use to demonstrate proficiency; and what resources you will need. Many design outlines include a storyboard of what content will be presented, how it will be presented, when it will be presented, how long it will take, and so on. Generally, a business leader will review and approve an initiative's design before you develop it in the next phase.

During the design phase, you'll conduct a content analysis, which involves identifying the knowledge, skills, and attitudes that learners need to exhibit in the application environment (or work setting) to produce desired results. Then you'll use that information to establish course learning objectives that inform course learning activities.

Evaluation Instruments

During this phase, you will create all of the evaluation instruments. This can be done after the coursework is developed, but it's more beneficial to create the evaluation instruments first if the same individuals are creating the curriculum and evaluation instruments. Creating evaluation instruments first ensures that what will be measured is included in the course content. Learn more about creating evaluation instruments in Appendixes B and C.

Develop

Once an initiative's design and evaluation instruments have been reviewed and approved by a business leader, you can then build out the initiative during the development phase. This is when the initiative is actually created, including any collateral, materials, and media required to implement it. Generally, a business leader reviews and approves a development document before the initiative is implemented in the next phase.

Implement

This phase is the actual execution of the TD initiative—when you announce the TD initiative and learners are invited or required to attend. It's the phase when facilitation or instruction occurs—the "go live" or event portion of a TD initiative. This is the phase that is the most visible to the most people. What happens during implementation gets evaluated as part of the evaluation process because it relates to whether the TD initiative produced the desired results. The implementation phase could be very short or rather lengthy. For some TD initiatives, implementation might be a one-hour course. For others, it could be a yearlong leadership development program.

Evaluation Execution

This phase involves collecting and analyzing data to understand how an initiative changed learners' behaviors and whether it achieved the intended results. This book does not focus on the execution of evaluation, but if you follow the eight steps of the Evaluation-Focused Instructional Design Framework, you will be well positioned to evaluate your TD initiative.

Summary

It's important for TD professionals and business leaders alike to reframe talent development as business development. To accept that is to accept that people development is business development and businesses grow as people grow. Once you see your work that way, you can help your business leaders follow suit. One way to do that is to infuse measurement and evaluation into your work as a TD professional, especially when creating learning programs.

Partnering with business leaders is essential to your function's success. Demonstrating business acumen to business leaders by assisting with identifying and addressing business challenges can go a long way in changing how they think about, feel about, and behave toward talent development.

Reimagining the time-tested and prevalent ADDIE framework by placing an emphasis on evaluation and infusing it throughout the process can be an effective way to connect TD initiatives to business results. Approaching talent development as business development with the partnership of business leaders will not only change your experience as a TD professional, but it could also improve the engagement of your people and the success of your business.

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About the Author

Kristopher J. Newbauer, EdM, MHRM, is the chief people officer and head of global people and talent for Rotary International and the Rotary Foundation, the world's oldest and largest humanitarian service-club organization.

Kris holds a bachelor of science in group social studies (secondary education) from Grand Valley State University, in Allendale, Michigan; a master of education in global human resource development from the University of Illinois Urbana-Champaign; and a master of human resource management from North Park University, in Chicago. He holds multiple certifications in both human resource management and human resource development, including:

- Senior professional in human resources (SPHR), by the HR Certification Institute
- Senior certified professional in human resources (SHRM-SCP), by the Society for Human Resource Management
- Certified professional in talent development (CPTD), by the Association for Talent Development
- Certified performance technologist (CPT), by the International Society for Performance Improvement
- Certified Prosci change management professional, by Prosci

Kris has completed multiple certificates in human resources from Cornell University and DePaul University. He served on the faculty of the Department of Education Policy, Organization, and Leadership in the College of Education at the University of Illinois Urbana-Champaign, as well as the Department of Literacy, Leadership, and Development in the Daniel L. Goodwin College of Education at Northeastern Illinois University, in Chicago, where he taught graduate courses in measurement and evaluation and organization development for several years.

He has served on the board of directors of the International Accreditors for Continuing Education and Training (IACET), a global accrediting body for training providers, since 2009. He served as president of the IACET Board for 2013–14 and was elected chair of the IACET Board for 2022–23.

Nominated by a former Rotary employee for his contributions to leading the way to extraordinary employee experience, Kris was recognized by *Crain's Chicago Business* as a Notable Leader in HR in 2020.

About ATD

The Association for Talent Development (ATD) is the world's largest association dedicated to those who develop talent in organizations. Serving a global community of members, customers, and international business partners in more than 100 countries, ATD champions the importance of learning and training by setting standards for the talent development profession.

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