A “dashboard” is defined as a convenient place for vital information organized into a graphical representation that is both easy to use and easy to understand. The dashboard should be a visualization of summary data so executives can glean insight into the performance of learning. This article discusses the enablers for creating effective learning measurement dashboards.

**Research Learning Metrics**

The first step is to learn what others have done first so you don’t reinvent the wheel. There are many great resources for learning metrics, including ASTD, KnowledgeAdvisors and ROI Institute. In addition there is research from the Learning & Development Roundtable in which numerous L&D organizations participated to look at L&D scorecards.

**Identify Macro Learning Constructs**

A Macro Learning Construct is a small, well-balanced set of broad learning metric classifications that summarize the results of the entire L&D organization. There are four macro learning constructs we suggest:

1. Operational
2. Financial
3. Performance
4. Cultural

Operational constructs answer the question, “How much did we train?” It is mostly volume or activity data, typically in a learning management or registration system.

Financial constructs answer the question, “What’s the benefit, cost or income statement impact?”
**Steps to Success**

Remember the five primary steps to successful dashboard creation:

1. Research learning metrics
2. Identify macro learning constructs
3. Build micro learning indicators
4. Build a process to collect and report
5. Design technology and templates for support

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Performance constructs answer the question, “How well did we train?” They look at results-oriented metrics.

Cultural constructs answer the question, “How conducive is our environment to training perceived as strategic to the organization?” This is important in times of major change in an attempt to stabilize the L&D organization.

These four areas naturally fit into a quadrant-type display, making them visually appealing.

**Build Micro Learning Indicators**

Micro Learning Indicators are a set of quantifiable performance measures linked to the macro learning construct that are tracked over time. The micro learning indicators are the actual key performance measures for the four learning constructs. (See Figures 1 through 4.)

**Build a process to collect and report**

The success factors in this step are the following:

- Start with Available Data
- Verify Data Is Credible
- Create Templates to Store and Track
- Conduct Routine Analysis (Monthly)
- Report Key Findings (Quarterly)

If you begin with data that is easy to gather and credible (note credible is reasonable, not necessarily precise) that gets you going. Then you want to build a standard template for the macro and micro variables to reduce rework and increase consistency and comparabil-

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**Figure 1: Operational Indicators**

- No. of Students Trained
- Instructor Utilization Rate
- E-Learning Utilization Rate
- Average Class Size
- Staff-to-Management Ratio
- Delivery Mix
- Survey Response Rates
- Class Completion or Cancellation Rates

Sources for this data include the learning management system or registration systems. We also include items like Delivery Mix here (what percent of activity is allocated to new hire, leadership, technical etc.).

Another great metric here is E-Learning Utilization Rate. This is the percent of the E-Learning library actively used. Research shows it is less than a third. As such a lot of waste exists and opportunities for streamlining are available.

**Figure 2: Financial Indicators**

- Cost per Student Day
- L&D Cost as a % of Payroll
- L&D Budget to Actual
- L&D Investment Mix
- Revenue Growth
- Human Capital Contribution Margin
- Productivity
- L&D ROI

Some measures like Cost per Student Day and L&D Budget to Actual are traditionally tracked. However, we suggest also tracking metrics like Revenue Growth, Human Capital Contribution Margin (Payroll + L&D Expense / Revenue), Productivity (Revenue / Employees) and L&D ROI.

Out of the most important is Productivity, at least to a CEO in how they view L&D. This is a financial-based metric that shows how much top-line output (revenue) can be generated per person. The more that number trends positively, the more productive human capital must be. An L&D dashboard must have this number as they are in the business of improving human capital performance and Productivity (Revenue/Employees) is the ultimate financial measure of that.
Potential Pitfalls

Remember not to get too caught up in challenges that can dampen your dashboard initiative. Items to avoid include:

1. Avoid building technology integration before the metrics have been defined and used in decision-making.
2. Avoid reinventing the wheel. There are great research studies completed on L&D dashboards as well as powerful technologies to report the metrics.
3. Avoid using hundreds of metrics in one area when a dozen or fewer metrics can be balanced across operational, financial, cultural and performance areas.

Design Technology and Templates for Support

The final step is to automate the collection, storage, processing and reporting of what you've built. Learning analytics technologies are great tools to build dashboards, input or import results and track and trend over time with interpretive color coding for analysis.

Conclusion

Jeffrey Berk is the chief operating officer for KnowledgeAdvisors, a human capital analytics technology company that helps organizations measure, communicate and improve the effectiveness of learning and human capital investments.

Email your comments on this article to editor@trainingindustry.com.

Performance metrics answer the “how well we train” question. So even the basic Level 1 smile sheet data points are included here. A key metric is Time to Job Impact. This is a performance metric after training and gathered on the job. It looks at when and what percent of people applied the learning. Research shows that 55 percent of learning is not optimally applied within six weeks. This is wasted training and to root it out is a way to use the metric to rid your organization of scrap and save hundreds of thousands of dollars.

The business results listed here can be tracked in two ways: 1) You can do an impact study to isolate the training impact to the result for a strategic, visible or costly program. We suggest the Phillips ROI Process to do this. 2) Just track the trends in business results that are important to the larger organization and/or have strategic learning assisting in their outcome.

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L&D dashboards are important communication and performance management tools. However, the best practice is to start with solid research and design and build simple processes to ensure you achieve desired results with the final step being automation of the process.

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