

Training Evaluation

By Martin Schmalenbach

What's It All About?

A lot seems to have been written about evaluating training. This may be in part because there seems to be a fair amount of confusion around, as well as for some a sense of something missing, of not being quite 'right'. In this series of articles I'll try to clarify things by asking some key questions, and not straying too far from them!

Questions

So, let's start with some key questions. I've taken the liberty of borrowing some from Fred Nichols as he asked these questions with impact some time ago, back in the early 1990s:

"Evaluate? Evaluate what? Training? What do we mean by training? What's to be evaluated? A particular course? The trainees? The trainers? The training department? A certain set of training materials? Training in general?"

"More to the point, why evaluate it? Do we wish to gauge its effectiveness, that is, to see if it works? If so, what is it supposed to do? Change behaviour? Shape attitudes? Improve job performance? Reduce defects? Increase sales? Enhance quality?"

"What about efficiency? How much time does the training consume? Can it be shortened? Can we make do with on-the-job training or can we completely eliminate training by substituting job aids instead?"

"What does it cost? Whatever it costs, is it worth it? Who says? On what basis? What are we trying to find out? For whom?"

Source: http://home.att.net/~nickols/evaluating_training.htm

These are all killer questions. In these articles I'll answer some of these questions, and others, including: when to evaluate, and when not to; who is responsible for which bits; when "quick & dirty" is OK, and when it isn't; which approach to use and when, and what is the bottom line or ROI contribution.

Definitions

Let's start with some definitions. There seem to be two different focuses for evaluation: focusing on the actual process of training or performance improvement (what's known as formative evaluation), and focusing on the final product or outcome of the process (what's known as summative evaluation). Evaluation seems to mean different things to different people, hence some of the confusion.

It's suggested by some of the killer questions that the answers and meanings depend upon perspective – who is asking the questions and why.

For **shareholders and managers** of an organisation the need to evaluate is to help answer the related questions of "will training fix my problem and/or help achieve our goals?" and "will it be worth it or should I invest my resources elsewhere?" The final question is now more obvious: "was it worth it?"

For the **trainer** perhaps evaluation is driven by the need to answer different questions, such as "was the training effective?" and "did it achieve its objectives?"

And for the **employee** the evaluation questions are likely to be “Will it help me do my job better/easier/faster?” “Will it help my career development?” “What am I doing here?” and “What’s in it for me?”

Given that most of the thinking on evaluation seems to have been done by those in the training world, is it any wonder that there is some tension between each of these three groups when evaluation comes up for discussion?

Kirkpatrick

In setting up systems and methods to answer the questions for just one group, it is quite possible that answering these key questions for the other two groups becomes difficult at best. These are all valid questions for each audience, perhaps the most famous early attempt to address these issues was made by Donald Kirkpatrick in the late 1950s with his now-famous 4 levels*:

Level 1 – Reaction – what is the reaction of the learner to the learning experience?

Level 2 – Learning – what has the learner actually learnt as a result of the learning experience?

Level 3 – Behaviour – to what extent have the behaviours of the learner changed as a result of the learning experience – sometimes referred to as transfer of learning to the workplace?

Level 4 – Results – how much better is the organisation performing as a result of the learner’s experiences in the learning programme?

In his 1994 book “Evaluating Training Programs: the Four Levels”, Kirkpatrick suggests that the effort and overheads required to evaluate at successively higher levels requires a growing amount of effort and resource, so it is perhaps easier and cheaper to evaluate at Level 1 but this is unlikely to be the case at Level 4. This is the argument (made by Kirkpatrick himself) for evaluating some 95% of training at Level 1 but perhaps only 5-10% of training at Level 4.

What is not so obvious is that Kirkpatrick’s model only prompts (it doesn’t enable as it doesn’t suggest how to do anything) you to evaluate after the fact – ie once the training has been delivered. In this sense it does not allow one of our three key groups, the shareholders & managers, to make an informed decision about investing limited resources in training before that actually committing those resources, all it can facilitate is answering the question “was it worth it?” If the answer is ‘No’ it’s too late – the deed is done and the resources spent. This is as true for ‘hard skills’ training as for ‘soft skills’ training – it’s just that ‘hard skills’ training is usually easier to determine the benefits of in advance.

Setting aside the issues of complexity and overhead for evaluating only 5-10% at Level 4, surely for the shareholders and managers, any and every activity that may take employees away from their usual tasks must be evaluated in some way, to some level, in order to make the best decision about whether to actually engage in this additional activity or not. This is the argument for evaluating everything. The danger is that in evaluating everything there is no time to do ‘the day job’! Clearly there needs to be some balancing, and this may vary from situation to situation.

It seems that Kirkpatrick’s 4 Levels are well suited to helping trainers in particular answer their key questions about how well the training met it’s objectives: did the training do “what it says on the tin”? It can go some way to helping employees answer their own key questions – but only after the fact.

ROI

Arguably Kirkpatrick’s Level 4 doesn’t readily address the question of whether it was worth it. In 1991 Jack Phillips added a 5th level to the Kirkpatrick approach, called ROI or Return On Investment. The question asked here is “did the training pay for itself and then some?” The units of ‘currency’ don’t have to be financial, though they often are. This 5th level introduces for the first time the need for the evaluator to appreciate the finer workings of the organisation and also

employ some skill in determining costs and benefits. Moreover, Phillips also developed what is more readily recognisable as a methodology or process that is repeatable and so can be more easily taught and deployed across many organisations. Indeed there is a certification programme for practitioners, popular in the USA in particular.

Some thinkers on evaluation have reacted against this additional 5th level, partly because ROI is a term from the world of finance and there is an inference in some minds that training must pay for itself in financial terms or it shouldn't happen at all. There is some sympathy for this view, especially if you happen to be a shareholder or manager. The additional inference is that a lot of training that currently takes place that is seen as useful by employees but is very difficult to quantify in such hard financial terms may now not pass the ROI test. But Phillips' addition to the original Kirkpatrick model doesn't eliminate the issues highlighted earlier about the training having to be done first, before the evaluation can be done with any certainty. This 5th level goes some way to addressing the needs of the shareholders and managers, but perhaps not enough.

Other models

Other models have evolved that are designed to ensure that the evaluation process casts a wider net in looking at inputs, outputs, the context in which the training is carried out or needed, the product of the training, and the processes involved. Examples include Tyler's Objectives approach, Scriven's focus on outcomes, Stufflebeam's CIPP, CIRO, Guba's Naturalistic approach and the V model (Bruce Aaron).

Other thinkers in the field, notably Paul Kearns in the UK, have sought to keep things simple and practical by suggesting that however you do the finer detail of evaluation, it's the questions you ask that are important, that you must have a baseline (ie credibly compare 'before' and 'after') and that some training activities are clearly 'must have' such as health & safety or that required by law, some training is clearly a luxury in that not doing it will not hurt organisation, team or individual in any professional or performance area, and that other training is 'value adding' in that it's purpose is primarily to enhance the performance of the organisation, in what ever aspect is deemed important.

In the next part of this series we take a look at some of these different approaches and models to evaluating training.

* Kirkpatrick, Donald L. (1994), "Evaluating Training Programs: the Four Levels"
San Francisco: Berrett-Koehler Publishers.

* Kirkpatrick, D. L. (1987). Evaluation. In R. L. Craig (Ed.), Training and development handbook. (3rd ed.). New York: McGraw-Hill

Methods, Models and Approaches

Apart from the widely known work of Kirkpatrick there are several other approaches to evaluating training. Each has its own features and benefits that may make it of more use in certain scenario.

Some notable approaches include Tyler's Objectives Approach, Scriven's Focus On Outcomes, Stufflebeam's CIPP (Context evaluation, Input evaluation, Process evaluation, and Product evaluation) the related CIRO framework (Content evaluation, Input evaluation, Reaction evaluation, Outcome evaluation) Guba's Naturalistic Approach and the V Model (Bruce Aaron).

Tyler mentions that one of the main problems with education is that educational programs "do not have clearly defined purposes". By "purposes" he means educational objectives. This objective-based approach to evaluation is at the core of what Tyler proposes. His approach to evaluation follows these steps:

1. Establish broad goals or objectives.
2. Classify the goals or objectives.
3. Define objectives in behaviour terms.
4. Find situations in which achievement of objectives can be shown.
5. Develop or select measurement techniques.
6. Collect performance data.
7. Compare performance data with behaviorally stated objectives.

Discrepancies in performance then lead to modification and the cycle begins again.

This is in many respects Kirkpatrick's Level 3 but expressed in more detail. I'm assuming that the training/education occurs somewhere between steps 3 and 5, though it is possible to do some base lining (i.e. get some 'pre training' performance data) though the language of step 7 suggests you compare post event behaviours with those that you wanted to develop, not how things were before.

However the objectives, defined in terms of behaviours, seem less obviously connected to the kind of results that facilitate evaluation in ROI terms. There is nothing in here though about the impact of other factors on behaviours, such as culture, structure, targets, and so on.

Scriven's Focus On Outcomes requires an external evaluator, who is unaware of the programme's stated goals and objectives, to determine the value and worth of that programme based on the outcomes or effects and the quality of those effects.

In one sense this is fine when focusing on the organisation's performance – it is easier to see the effect of the programme perhaps than when looking at individual performance or goals. There could be issues about individual bias and interpretation, and to what extent the evaluator is or can be briefed. This model by definition cannot readily forecast the likely outcomes and so does not lend itself to ready use in an ROI context, especially as it makes little reference to determining root causes for poor performance or unwanted behaviours.

Stufflebeam's CIPP model is what is known as a systems model. Primary components include:

- * Context - identify target audience and determine needs to be met.
- * Input - determine available resources, possible alternative strategies, and how best to meet needs identified above.
- * Process - examine how well plan was implemented.
- * Product - examine results obtained, whether needs were met, what planning for future required.

Interestingly this model explicitly looks at both process and product – it is both formative and summative in focus (defined in part 1). Evaluation of the likely outcomes is not included prior to actual delivery of training, and so the model does not lend itself to ready use in an ROI context without further modification. The 'context' element further suggests that training is part of the solution and so assumes in part a prior step which makes this determination, and so as this model stands it is further removed from the needs of ROI-based evaluation. Unlike the Phillips and Kirkpatrick models this does require the effectiveness of the process to be looked at – this is often referred to in other texts as 'validation' in order not to be confused with evaluation – i.e. focusing on outcome – did it deliver its objectives?

The CIRO model developed by **Bird** et al encompasses several of Kirkpatrick's levels, specifically levels 1 and arguably 4, if the outcomes are expressed in terms of business impact. The main elements are Content, Input, Reaction and Outcome. It is very similar to the CIPP model in most other respects, and, to my mind, shares in a lack of detail and prescription in how to undertake any of these four main elements.

It could be argued that both the CIPP and CIRO approaches follow Kirkpatrick and Phillips in using control groups and estimates of improvement by subject matter experts in order to deliver a repeatable process that can begin to answer questions of value and good use of limited resources.

The **Guba & Lincoln** model places its emphasis on collaboration and negotiation among all the stakeholders as a change agent in order to “socially construct” a mutually agreed-upon definition of the situation.

All the stakeholders involved (including the evaluators) are assumed to be equally willing to agree to change. On further reflection this probably most closely resembles reality in organisations where evaluation is required after the fact. In the absence of any objective tools, the stakeholders collectively agree a judgement on the value of the programme in question. It lends some structure to the notion that training “is done on trust”. It seems not to lend itself to the rigour and objectivity demanded by an ROI approach.

The ‘V Model’ as adapted by **Bruce Aaron** (see <http://www.astd.org/pdfs/W207.pdf>) is based on an approach in the IT world used for developing software.

Imagine a ‘V’ where the left hand slope is labelled analysis and design. From the top, moving down the slope you will find ‘business need’, then ‘capability requirements’ then ‘human performance requirements’ and finally at the bottom, where the left and right hand slopes join, you will find ‘performance solution’. From the top of the right hand slope (labelled measurement and evaluation) you will find ‘ROI / business results’, then moving down we come to ‘capability status’, then ‘human performance impact’.

The connection between each element and its element on the opposite slope and at the same level is deliberate – the symbiosis almost between analysis and design, and measurement and evaluation. It is both formative and summative in looking at capability/process as well as solution/product.

It is very much designed to support the ROI approach, though it is not immediately apparent if the ROI and evaluation can be readily forecast before committing to the solution – arguably the model supports the concept even if it is light on the details of how this is done.

Interestingly none of the models, with the possible exception of the ‘V’ model, suggests who should be responsible for doing which bits, though with the bulk of the thinking having been done by people connected to the training world, there is an assumption, borne out in practice, that the trainers do it (and take the hit for a poor result).

Further reading

An interesting timeline of evaluation can be found at <http://www.campaign-for-learning.org.uk> Further brief information is also available at <http://web.syr.edu/~bvmarten/evalact.html> and has been a useful source for this article.

When and How to Evaluate

Setting aside any personal views about always evaluating training and performance enhancing interventions, there are times when you perhaps should NOT evaluate. The following covers most situations for when you should and shouldn't evaluate.

Training may need to take place in a hurry, for whatever good reasons, to the extent that the elapsed time needed to do the evaluation properly is too long to be able to directly influence the decision as to whether to commit resources to the training or not.

There is one good reason to do the evaluation anyway, and that is to develop some data and that can help to validate the decision taken and so support organisational learning about how to respond to such scenarios in the future.

When to evaluate	When NOT to evaluate
<p>Political Necessity The training in question is in such a bright political spotlight that it needs to be seen to be value adding. The method for evaluating this "value-add" therefore needs some credibility & robustness to stand up to closer scrutiny.</p> <p>Having a 'pre training' baseline will be very important in demonstrating robustly that the 'after' is better than the 'before'. This baseline will need to be firmly anchored on a solid root cause analysis to ensure credibility.</p> <p>A trainer or training department should associate itself clearly with value-adding activities if it is to ensure it does not get 'downsized' the next time resources become even more scarce.</p>	<p>Regulatory Or 'Must Have' Training The training is required either as part of a statutory requirement or other legal instrument (e.g. health and safety related), or the organisation believes within its core values that the training is the right thing to do (e.g. induction).</p> <p>The training can still be validated though - did the training do what "it says on the tin"? and perhaps also "was this the most efficient way of delivering the training?"</p>
<p>Client Requirement Obviously if a client (internal or external) asks for it, then do it, or more appropriately, help them to do it themselves - it's their resources being spent!</p> <p>Again, having a robust and rigorous process really helps. The client may already have one, but it won't hurt to challenge it in the sense of making sure it can actually answer the key questions the client is likely to have.</p>	<p>"Luxury" Training The training is not required to add to the bottom line or otherwise move forward the performance of the individual/team/organisation, i.e. it's a 'luxury' so deploying limited resources to evaluate or even validate the training is not good use of them. An obvious example is non-work related training that some organisations provide to employees in the form of say £100 per year to cover things like pottery classes or sports/arts/crafts at night school.</p>
<p>Decisions Surrounding Limited Resources Any manager responsible for deciding where, when and how to deploy limited resources would like to know in advance the likely benefits of each option so he or she can more easily make the decisions that lead to success. This should apply to training, after all employees are diverted from their 'day jobs' to attend or participate, money and other resources are deployed in order to make sure the training</p>	<p>When There Is No Time To Do It Properly Training may need to take place in a hurry, for whatever good reasons, to the extent that the elapsed time needed to do the evaluation properly is too long to be able to directly influence the decision as to whether to commit resources to the training or not.</p> <p>There is one good reason to do the evaluation anyway, and that is to develop some data and that can help to validate the</p>

<p>takes place and is exploited. This is one case where evaluating in advance is going to be a huge help to managers.</p>	<p>decision taken and so support organisational learning about how to respond to such scenarios in the future.</p>
<p>Client Relations A training function should ensure that its clients are completely clear about the aims, outcomes and expectations arising from the intervention. In doing so it has a better chance of actually meeting the client's requirements and managing effectively any expectations. This is part of the art of good customer or client relations, and can do wonders for bottom line performance for both client and training function, as well as encourage future repeat business. Such a situation is unlikely to lead to future downsizing on the grounds of limited resources!</p>	<p>When Not Allowed Or Able To Develop A Baseline If you can't develop (for any reason) a credible baseline of performance of key indicators, including those relating to any root cause analysis, you really have nothing to compare the new performance against. Any evaluation you do can not be judged as objective, is likely to lose credibility as a result, so why waste the effort and heartache of a full evaluation? You can certainly develop a subjective view of those involved, basically by asking "in what way was it worth it?"</p>
<p>Buy-In From Staff & Line Managers When buy-in is needed from line managers and their staff who will be attending any training or participating in associated interventions, it helps if they know what is expected, why, their part to play in it and how the training and interventions help them do their jobs better/quicker/cheaper - and to some (great!) extent, answers the "what's in it for me" question as well.</p>	<p>When the reasons for doing the intervention cannot be expressed in terms of strategic objectives and/or key performance measures If you can't measure the performance issue and/or explicitly and credibly link the activity to the strategic objectives, not only should you consider NOT evaluating, you should also consider NOT doing the intervention at all!</p>
<p>After The Fact - i.e. After Training If you are asked to conduct an evaluation there are generally 2 things that can come out of it: lessons to learn for the future, and political activities designed to show the worth or otherwise of a training programme or function that is either falling out of favour, or is the target for losing resources because all other departments have been able to defend their resource allocations and historically the training function has not been good at this.</p> <p>If you can develop a baseline with supporting root cause analysis, even after the fact, then you can do a reasonable evaluation. Either way you can state what has and hasn't happened in the past, and how things will be in the future, starting immediately. It's a chance to show a reliable, robust and credible process and your part in it, and how the combination will contribute positively to the bottom line in the future. It may get you a reprieve!</p>	
<p>Academic and other research</p>	<p>Any approach you want, as required by the research!</p>

Who Is Responsible For Which Bits

Who does the evaluation is almost immaterial, so long as it is done competently. Arguably the persons involved should be suitably trained and credible. What is more important is who takes key decisions about direction, tasking and resource allocation as a result of any evaluation? This person is actually making the ultimate evaluation and presumably needs to know in advance of allocating resources so as to be more sure of making a suitably informed decision.

In practice the training function will oversee the process but staff and front line managers are most likely to be involved in gathering the data and probably even analysing it.

Who reports on the results, and to whom, is a question of structure and politics.

When “Quick And Dirty” Is Enough – And When It Isn’t

I guess the simple answer is “ask the client”. After all, they have to justify to higher authority why they allocate their limited resources the way they do for the results they deliver. So, ask them if they require an in-depth evaluation. If they do, go through an agreed process, using an agreed model.

If they don’t, get this in writing and tell them that evaluating at a later date will be at best a guess, and will be on their heads. Why should you be responsible for somebody else’s bad judgement?

Audience	Approach or Model To Use
Trainer/Training Dept	Kirkpatrick Level 1 - useful feedback on environmental issues, pace of delivery etc and specifics for the actual trainer. ALWAYS. Kirkpatrick Level 2 - this will indicate if the training is being learned - if there are future problems this will help to eliminate or otherwise pinpoint if training methods and objectives are at fault. Ideally ALWAYS do this. ROI-focused approach - this will demonstrate the value-adding contribution of the training function. ALWAYS do this. If you can't, put it in writing WHY, and share this with the client and higher authority.
Manager/Client	ROI-focused approach - this is the business case they need to get behind the intervention and fully support it in resourcing and priorities. Do this ALWAYS at the programme level unless the manager/client waives this in writing, in which case ensure they know the consequences of this, and that changing their minds in the future does not make for a credible evaluation. DO NOT do this at the individual level - let line managers make that judgement, with your "guidance". Kirkpatrick Level 3 - behaviours need to change if performance is to change, so ALWAYS do this at the programme level, and if possible, for each course and individual too.
Shareholder/Owner	ROI-focused approach - this is the business case for having and keeping the training function. Do this ALWAYS, but not necessarily for each programme, but certainly for the function as a whole in any major reporting cycle, at least quarterly.
Delegate/Employee	CIRO / CIPP as these look at the process, outcomes or product, inputs etc - much closer to the operational or 'shop floor' end of the organisation. Help delegates to do this for themselves ALWAYS, ideally with involvement from their line managers.
Academic and other research	Any approach you want, as required by the research!

What Is The Bottom Line or ROI Contribution?

The bottom line or ROI question is almost always going to be set in context: "Is/was this improvement project worth doing?" That means everything, from the overtime needed to install new equipment to the training needed to ensure it is used effectively and efficiently – the training on it's own is usually meaningless and worthless – it needs context. So in the above example, where a benefit of increased profits of \$1M as a result of \$40K spend on training and \$300K bringing in new equipment, the ROI for the training is meaningless, just as meaningless as the ROI on bringing the equipment in. The actual ROI is $(\$1M \text{ less } \$340K)/(\$340K)$, or about 194%. By the way, the \$40K could be formal training or it could be the cost in time and waste as a result of trial and error on the job – either way there is a cost! If trial and error is cheaper and no more dangerous than formal training, it's clear which way to go (assuming the employees don't take it to heart!).

Taking Control for ROI

A popular technique used when evaluating training beyond Kirkpatrick levels 1 and 2 is the control group. The concept is quite simple. Take two groups, one group goes through the training, the other doesn't. Compare the performance of each group after training. The group that has undergone the training is presumed to perform better than the group that didn't, and the value of the increased performance can be attributed wholly to the training. The return on investment (ROI) can then be calculated with ease.

The fact that one group doesn't get to do the training, at least, not for a while, means that not everybody can operate at a higher level of performance at the earliest opportunity – there is a cost here in terms of lost opportunity.

Note also that this approach can only enable an evaluation to be done after the fact – you cannot readily forecast any ROI with this approach – which may not help managers decide where best to deploy limited resources.

There is also the presumption in this approach that any change in performance is due to the training (ie just one factor), and thus performance change is likely to be positive. If the performance change were negative would there be moves to demonstrate that some other factor was responsible, and what factors were at work? Using control groups in this way is unlikely to lend credibility to the evaluation because it is not clear what factor or factors are at work, including the training.

Credibility

If control groups are to be used, perhaps as part of a wider evaluation strategy, then there are some steps to be taken to ensure credibility of the results.

Briefly these are:

- * Identify all the factors that could influence the performance levels.
- * Create enough groups so that each factor can be isolated in terms of demonstrating its contribution to increased performance.
- * Ensure that each group is 'statistically similar' to each other, for example by randomly assigning personnel to each, and ensuring no bias creeps into the minds of each individual as a result of knowing they are taking part in what is effectively an experiment (the so-called Hawthorn Effect).

Generally, for two factors a minimum of four groups are needed, for three factors it increases to eight groups, for four factors 16 groups and so on. Typically there will be anywhere from four to eight factors accounting for 80% or more of any performance change. That's a lot of control groups! And a lot of elapsed time to conduct all the 'experiments'.

Now perhaps it becomes clear how the use of control groups in evaluations in the past have not been enough to help with credibility – in fact such an approach opens the door to rapid destruction of any credibility that the evaluation might get from other techniques.

"Expert" Estimates Of Improvement

A second popular technique used in evaluations is to ask experts in the form of the delegates attending the training and/or their line managers, perhaps even some 'real' experts with a lot of experience of the processes affected by the training, to estimate the change in performance as a result of the training intervention.

This is a great way of involving those people with a clear expertise and reputation in the processes affected. But do they consider all the possible factors that could contribute? Can they consider them? Their very deep expertise and experience may blind them from some well-hidden but significant factors. Or it might not. All you have is an estimate, albeit from some credible people.

The point is, nobody can know without carrying out a rigorous and robust root cause analysis. And this needs to be done before the training and other interventions to ensure that 'the waters aren't further muddied'. We can perhaps all appreciate that in legal cases each side can produce their own highly regarded experts to refute or otherwise prove the assertions of each side.

This technique has its merits, but not in the way not is used here. In this situation it suffers the same pitfalls as the control group approach when badly used.

Root Cause Analysis

A root cause analysis, in its simplest form, is a process that is followed to identify all possible root causes contributing to a phenomenon, such as poor performance, and to then identify those few root causes that account for the vast majority of that phenomenon.

For example, there are well over 100 root causes that affect the accuracy of a Roman catapult, many quite obscure, such as air density, air gusts, turbulence, temperature of the load, friction between the load and the bucket or cup that holds it at the end of the catapult arm, right up to some obvious ones such as tension in the ropes, the mass of the counter-balance and the direction the catapult is pointing in. But only about six are of practical interest as they generally account for perhaps 90% or more of the variation in accuracy.

Without this clarity we can never know what needs to be changed to improve the accuracy of the catapult – we are just blindly fiddling with things in the hope we get it right, and sometimes we do and all seems to go fine for a while, then it all goes wrong again and repeating what we did last time just doesn't seem to work any more.
Sound familiar?

So, do a root cause analysis and then you will know in advance the likely performance improvements and what you need to do to realise them. It makes the ROI bit not only easy, but credible.

Expectations

A further danger is not managing expectations of the client and others involved, and related to this, keeping everything a big secret.

So long as you help to manage the expectations of all involved, there can be no horrible surprises for anybody. This doesn't mean that everybody is happy, just that you are less likely to be blamed when the desired outcome doesn't materialise.

Keeping everybody affected by any intervention informed of what is happening, why, when, and with or to whom, means it is less likely you will encounter resistance, passive or otherwise, and more likely you will get at the information needed to help the client make some really firm evaluations before committing resources. That can only help your own cause in the long term.

About The Author

Martin Schmalenbach has been enhancing performance through change and training & development for more than 10 years in organisations such as the RAF, local government, through to manufacturing and financial services. He has degrees in engineering and management training and development. For the past three years he has focused on developing and implementing a rigorous, robust and repeatable process for ensuring interventions contribute to the bottom line.

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