

# Training Value Questionnaire



By Iris Nunn

---

## WHERE/WHEN

Learning and Performance professionals are encouraged to use the Training Value Questionnaire to ensure value is the result of a strategic initiative, typically one that is training-based. The three general question categories will help ensure that the targeted training or other intervention improves organizational performance based on what the executives and/or stakeholders consider valuable. The Training Value Questionnaire identifies:

- the targeted Return on Expectation (ROE) (Kirkpatrick, 2009), business need and desired results.
- how training will be reinforced and supported on the job by business partners.
- what is required to achieve results in addition to training.

Practitioners currently use the tool as a conversation starter at the onset of a training request. To move immediately to the process of designing, developing, and delivering the requested training, a thorough planning process should take place. The tool offers many questions, often reworded in different ways to identify the targeted ROEs, business needs and desired results; how training will be reinforced and what additional interventions may be required to facilitate training. The apparent redundancy and rewording of the questions provide the IPT practitioner flexibility in choosing the questions in order to speak the language of the stakeholder. Use all or some of the questions under each of the three general categories to effectively add value through the training initiative and demonstrate the value to stakeholders. Helping the client clarify the desired results from the beginning facilitates the successful delivery of the desired outcome. As described in ISPI's (2002) Performance Standard 3-Add Value, our client will ask whether or not we added value in the way we worked with them and our suggested intervention.

It is strongly recommended that the practitioner does not go into initial meetings with sponsors and stakeholders with a blank template. Instead, use select questions in this tool to prepare possible or likely answers, so that the practitioner can act as a true business partnership consultant, and not an order taker. Questions selected should be based on the importance and urgency of the targeted initiative, available time (and patience) of the stakeholders, and the specific information that needs to be collected in order to put together a targeted, cost-effective learning and performance plan. Of course, four level evaluation methods need to be woven into the plan from the start.

## HOW/WHAT

### 1. What are the targeted ROEs, business needs and desired results?

The first set of questions is designed to uncover the end the stakeholders have in mind. This set of questions also correlates to the International Society of Performance Improvement's (ISPI) (2002) Performance Standard 1: Focus on Outcomes. By focusing on outcomes, the IPT practitioner can accurately measure success at a Level 4. According to Haig & Addison (2009), "when users fail to

# Training Value Questionnaire



By Iris Nunn

specify the results they want their training to produce, they lack the critical information needed to evaluate at Levels 3 and 4, limiting the effectiveness of their training efforts” (para. 2).

<b>1. What are the targeted ROEs, business needs and desired results?</b>
What is the business need?
What business impact are we looking for?
What organizational results are you looking for?
Is this aligned with your vision and mission?
What is the strategic plan?
What does success look like to you?
What outcomes do you expect?
What are your expectations of the initiative?
What are the CEO’s main priorities?
What contribution will the new behavior make to the organization?
What will be different as the result of the training intervention?
What other benefits will the training produce other than the targeted business result? (Customer satisfaction, increased revenues, avoided costs, time savings, employee retention, employee satisfaction, employee camaraderie, professionalism, etc.)
What will be measured as evidence that the business need was met?
How will you track the evidence?
What data (reports, profits, metrics) will be used to indicate success?
Will the value of the desired result outweigh the cost?

## 2. How will training be reinforced and supported on the job?

According to Kirkpatrick (2009), training cannot take all the credit for success. Training cannot deliver organizational results without help from business partners before and after training (Kirkpatrick, 2009). Villachica and Stepich (in press) recommend collaborating with sponsors and other stakeholders outside the training department to promote the transfer of training to the job as one of five best practices to adopt. ISPI (2002) in Performance Standard 4 describes this concept as “working in partnership with clients and other specialists- that is collaboratively” (p. 11). The second set of questions addresses how business partnerships will facilitate training. Because 70% of training failure is in the application environment, according to a 2006 ASTD study (as cited in Kirkpatrick, 2010), it is imperative that we examine how training will be supported and reinforced back on the job by business partners. It is just as important to make business partners aware of their contribution to the success of a training initiative. In asking the questions presented below, we can start a conversation regarding the importance of their involvement. According to Kirkpatrick (2009), “business partnership, not the delivery of training programs, is the secret to positive outcomes” (p. 5).

# Training Value Questionnaire



By Iris Nunn

<b>2. How will training be reinforced and supported on the job by business partners?</b>
How will the KSAs be applied on the job to improve organizational performance?
What partnerships must be formed to accomplish the ROE? (Exemplary Performers, Operations, Management, Information Technology, SMEs, HR)
Will management be able to coach/reinforce the KSAs?
Will some form of follow-up training be needed?
What type of support network does the client/department have in place?
How will application of the new behavior be reinforced/recognized?
Can there/will there be a mentorship/role model in place?
Will employees receive feedback on their application of the training?
How will the training solution be maintained? For new hires?

### 3. What is required to achieve results in addition to training?

The third set of questions uncovers other performance improvement interventions that will help facilitate and leverage the training intervention. As many pioneers in performance technology have demonstrated, the solutions to performance problems do not always include training (Rossett, 1992). And if the solution does include training, the solution may require additional interventions to leverage training's positive results. Gilbert (2007) described this as the diffusion of effect and leverage concept in *Human competence: Engineering worthy performance*.

<b>3. What is required to achieve results in addition to training?</b>
What is the likelihood that employees will apply the training on the job?
Will employees know that they are expected and/or required to apply on the job what they learned in training?
Will employees have the time to apply what they learned in training?
Will there need to be some type of job redesign?
Will different criteria in the selection of employees facilitate the desired result?
Do employees have the resources to use what they learned? Do they need job aids to remember steps, procedures and processes?
Are employees aware of the mission, vision and goals of the organization?
Will the employees receive monetary and non-monetary incentives for applying training?
Will there be consequences for not applying the training on the job?
Will employees be evaluated based on their application of the training on the job on their yearly performance appraisal or some other system?
Are there any obstacles that will need to be removed?

# Training Value Questionnaire



By Iris Nunn

Would some type of facilities redesign assist in the training goal?
Which one of these or combination of these do you see as facilitating the training initiative the most?
Which one of the interventions discussed above is the cheapest?
Will the organization be able to support the non-training interventions?

## CASE STUDY

One of the advantages of having a tool such as this is having a systematic way of identifying the information we need as training professionals. This not only makes our job easier, but also ultimately benefits the client. This tool has been developed with the hindsight of several training requests. The following case study is based on a request from MemberSource Credit Union (MSCU) to develop customer service training that will increase products and services per household from 2.2 to 4.0. The training has already been completed. Unfortunately, not all of the questions were asked pre-training; however, there is still an opportunity to provide some of the data obtained in the Training Value Questionnaire to MSCU to help ensure training success going forward. An asterisk \* will denote hypothetical data.

## ANALYSIS

Training Value Questionnaire
<b>1. What are the targeted ROEs, business needs and desired results?</b>
What is the business need? <b>Increase products and/or services from 2.2 to 4.0.</b>
What business impact are we looking for? <b>Increased profits.</b>
What organizational results are you looking for? <b>Increased profits passed on to members.</b>
Is this aligned with your vision and mission? <b>Yes.</b>
What is the strategic plan? <b>A leading credit union in the Houston area.</b>
What does success look like to you? <b>Member satisfaction. Increased revenue.</b>
What outcomes do you expect? <b>Better customer service, increased products/services per household.</b>
What are your expectations of the initiative? <b>Increased membership, higher customer service ratings, increased products/services per household.</b>
What are the CEO's main priorities? <b>Profitability, increased revenue, being one of the premier credit unions in the city.</b>
What contribution will the new behavior make to the organization? <b>Increased revenue.</b>
What will be different as the result of the training intervention? <b>Satisfied customers, frontline staff that can identify needs, recommend solutions.</b>
What other benefits will the training produce other than the targeted business result?

# Training Value Questionnaire



By Iris Nunn

(Customer satisfaction, increased revenues, avoided costs, time savings, employee retention, employee satisfaction, employee camaraderie, professionalism, etc.) <b>Customer satisfaction, increased revenue, employee retention, employee satisfaction, internal customer service.</b>
What will be measured as evidence that the business need was met? <b>Products and services per household and customer satisfaction surveys.</b>
How will you track the evidence? <b>Reports on products/services per household, KPIs, Pre- and Post training customer satisfaction data.</b>
What data (reports, profits, metrics) will be used to indicate success? <b>(see above)</b>
Will the value of the desired result outweigh the cost? <b>Yes.</b>
<b>2. How will training be reinforced and supported on the job by business partners?</b>
How will the KSAs be applied on the job to improve organizational performance? <b>Frontline staff will identify members' needs by reviewing their client profile and asking questions during each transaction. Once a need is identified, staff will make a recommendation, usually a product or service, that will meet the need. Staff will also highlight the benefit of the solution by showing how it saves time, money and/or provides peace of mind.</b>
What partnerships must be formed to accomplish the ROE? <b>(Exemplary Performers, Operations, Management, Information Technology, SMEs, HR) *Exemplary Performers as coaches/ role models, management as coaches, IT/Reporting to track the number of products and services per household produced by each staff member, HR and management for changing evaluation criteria. (At the time of training, MSCU only committed to management as coaches)</b>
Will management be able to coach/reinforce the KSAs? <b>Not without training on how to coach these skills.</b>
Will some form of follow-up training be needed? <b>No.</b>
What type of support network does the client/department have in place? <b>N/A</b>
How will application of the new behavior be reinforced/recognized? <b>*Pay by performance, criteria on yearly evaluation, QA scores, management coaching and recognition. (At the time of training, MSCU had not committed to the above)</b>
Can there/ will there be a mentorship/ role model in place? <b>*Exemplary Performers.</b>
Will employees receive feedback on their application of the training? <b>Yes.</b>
How will the training solution be maintained? For new hires? <b>Consultant will train the trainer.</b>
<b>3. What is required to achieve results in addition to training?</b>
What is the likelihood that employees will apply the training on the job? <b>*High if reinforced by management through coaching and incentives.</b>
Will employees know that they are expected and/or required to apply on the job what they learned in training? <b>Only if management reinforces the behaviors.</b>
Will employees have the time to apply what they learned in training? <b>Management must initially allow the additional time (2-5 minutes) with members until the steps become routine. The conversation should take no longer than 30 seconds – 2 minutes.</b>

# Training Value Questionnaire



By Iris Nunn

Will there need to be some type of job redesign? <b>Yes. This will be an additional task to complete.</b>
Will different criteria in the selection of employees facilitate the desired result? <b>*Yes. Tellers and Financial Service Representatives (FSRs) can be hired and promoted (in addition to other factors) based on how well they can identify needs and recommend solutions.</b>
Do employees have the resources to use what they learned? <b>No. Product and Service brochures were across the lobby out of reach of tellers. Tellers also did not have access to FSRs business cards to give to members.</b> Do they need job aids to remember steps, procedures and processes? <b>Yes. Job aids were introduced, explained and given to staff during training.</b>
Are employees aware of the mission, vision and goals of the organization? <b>No. They were introduced to it during training.</b>
Will the employees receive monetary and non-monetary incentives for applying training? <b>At the time of training, no. But in retrospect, this should have been highly recommended and encouraged by the training consultants.</b>
Will there be consequences for not applying the training on the job? <b>At the time of training there was no discussion of this. Clients should be encouraged to consider the importance of rewards and consequences in reinforcing training.</b>
Will employees be evaluated based on their application of the training on the job on their yearly performance appraisal or some other system? <b>Again, at the time of training there was no discussion of this. Clients should be encouraged to consider if the performance objectives are important enough to put on evaluations. This is an example of the importance of alignment. If training is aligned with an important business goal, evaluation objectives should mirror this.</b>
Are there any obstacles that will need to be removed? <b>Yes. The paradigm shift that this is not my job to do.</b>
Would some type of facilities redesign assist in the training goal? <b>N/A</b>
Which one of these or combination of these do you see as facilitating the training initiative the most? <b>Job aids, feedback and incentives. (Only incentives were not actually discussed)</b>
Which one of the interventions discussed above is the cheapest? <b>Job Aids.</b>
Will the organization be able to support the non-training interventions? <b>I wish I would have asked this question.</b>

## The results or expected results of using the tool

If given the chance to go back in time and consult with MSCU, knowing what I know now, I would use the Training Value Questionnaire to ensure that the training provided added value by clarifying the ROE, stressing the importance of reinforcement and support on the job by business partners and identifying other interventions that would have leveraged the training provided. In the case of MSCU, using the Training Value Questionnaire would have initiated discussion regarding the importance of incentives to the success of the training initiative.

# Training Value Questionnaire



By Iris Nunn

---

## CONCLUSION

The questions not only help the training professional plan the intervention, but help the client understand the factors that facilitate training transfer and produce business results. Villachica and Stepich (in press) contend that stakeholders who see the value will be less likely to want to cut training budgets and eliminate training jobs. By using the tool, we are using stakeholders and partners' words and definitions to demonstrate post-training value. By answering the questions posed in the Training Value Questionnaire and acting on them, we can more confidently answer "yes" to the following question: "Did you add value in the way you worked with the client and your suggested intervention" (ISPI, 2002, p. 7).

Once the initiative has been rolled out, it is important to gather relevant quantitative and qualitative data to make sure that value is being added all along the way, and that the required drivers at Level 3 and leading indicators at Level 4 are pointing the way to ultimate mission or business success.

---

## About the Author

**Iris Nunn** founded Nunn Training and Development in 2009. She has experience as a trainer, instructional designer, instructional design manager and public school teacher.

Currently she's involved in creating blended learning, e-Learning and instructor-led training for a national non-profit client, helping teachers transition to careers as trainers, working with executives and professionals on presentations skills and PowerPoint, and conducting train the trainer classes on various topics based on clients' needs.

Her interests are ROE and evaluation, adult learning theory, and train the trainer. She is a member of the American Society of Training and Development and the Women's Leadership Advisory Board, an organization for the advancement of women leaders and entrepreneurs.

Iris is currently working on her MS Degree in Instructional & Performance Technology from Boise State.

She lives in Spring, Texas with her husband, Paul, also a Learning and Performance professional and their two children Emily and Paul Jr.

Iris may be contacted at [Iris@NunnTraining.com](mailto:Iris@NunnTraining.com) or visit her website at [nunntraining.com](http://nunntraining.com).

# Training Value Questionnaire

By Iris Nunn



## APPENDIX

Training Value Questionnaire
<b>1. What are the targeted ROEs, business needs and desired results?</b>
What is the business need?
What business impact are we looking for?
What organizational results are you looking for?
Is this aligned with your vision and mission?
What is the strategic plan?
What does success look like to you?
What outcomes do you expect?
What are your expectations of the initiative?
What are the CEO's main priorities?
What contribution will the new behavior make to the organization?
What will be different as the result of the training intervention?
What other benefits will the training produce other than the targeted business result? (Customer satisfaction, increased revenues, avoided costs, time savings, employee retention, employee satisfaction, employee camaraderie, professionalism, etc.)
What will be measured as evidence that the business need was met?
How will you track the evidence?
What data (reports, profits, metrics) will be used to indicate success?
Will the value of the desired result outweigh the cost?
<b>2. How will training be reinforced and supported on the job by business partners?</b>
How will the KSAs be applied on the job to improve organizational performance?
What partnerships must be formed to accomplish the ROE? (Exemplary Performers, Operations, Management, Information Technology, SMEs, HR)
Will management be able to coach/reinforce the KSAs?
Will some form of follow-up training be needed?
What type of support network does the client/department have in place?
How will application of the new behavior be reinforced/recognized?
Can there/ will there be a mentorship/ role model in place?
Will employees receive feedback on their application of the training?
How will the training solution be maintained? For new hires?

# Training Value Questionnaire



By Iris Nunn

<b>3. What is required to achieve results in addition to training?</b>
What is the likelihood that employees will apply the training on the job?
Will employees know that they are expected and/or required to apply on the job what they learned in training?
Will employees have the time to apply what they learned in training?
Will there need to be some type of job redesign?
Will different criteria in the selection of employees facilitate the desired result?
Do employees have the resources to use what they learned? Do they need job aids to remember steps, procedures and processes?
Are employees aware of the mission, vision and goals of the organization?
Will the employees receive monetary and non-monetary incentives for applying training?
Will there be consequences for not applying the training on the job?
Will employees be evaluated based on their application of the training on the job on their yearly performance appraisal or some other system?
Are there any obstacles that will need to be removed?
Would some type of facilities redesign assist in the training goal?
Which one of these or combination of these do you see as facilitating the training initiative the most?
Which one of the interventions discussed above is the cheapest?
Will the organization be able to support the non-training interventions?

# Training Value Questionnaire

By Iris Nunn



## References

- Chyung, S. Y. (2008). *Foundations of instructional and performance technology*. Amherst, MA: HRD Press.
- Gilbert, T. (2007). *Human competence: Engineering worthy performance* (Tribute edition). San Francisco, CA: Pfeiffer.
- Haig, C., & Addison, R. (2009, November). Return on expectations. *Performance Xpress*. Retrieved from <http://performancexpress.org/0911/>
- International Society for Performance Improvement (2002). *ISPI's performance technology standards*. Silver Spring, MD: author. Retrieved from [http://www.ispi.org/uploadedFiles/ISPI\\_Site/About\\_ISPI/About/Standards.pdf](http://www.ispi.org/uploadedFiles/ISPI_Site/About_ISPI/About/Standards.pdf)
- Kirkpatrick, J. (2010, February). *Training on trial: The urgent need to meet the needs of the business*. Paper presented to Boise State University's Instructional and Performance Technology department Boise, ID. Retrieved from IPT 536 4156/4157 course database.
- Kirkpatrick Partners. (2009). *The Kirkpatrick four levels: A fresh look after 50 years*. Retrieved from <http://www.kirkpatrickpartners.com/Resources/tabid/56/Default.aspx>
- Rossett, A. (1992). Performance technology for instructional technologists: Comparisons and possibilities. *Performance and Instruction*, 31(10), 6-10. doi:10.1002/pfi.4170311004
- Villachica, S. W., & Stepich, D. A. (in press). Surviving troubled times: five best practices for training professionals. *Performance Improvement Quarterly*. Retrieved from IPT 536 4156/4157 course database.