

Stone: So, we've been talking so far in the context of kind of a corporate environment where there's a hierarchy. But it strikes me that all the disciplines that we're talking about exercising here have equal, if not greater, application for the... for the individual practitioner that's out in the field and maybe they really know their craft, and they are charged with responsibility of transferring their expertise, providing their counsel, and if they don't exercise some of these disciplines we're talking about, they could either a) not provide the value that they could and should, or even if they do, not be able to demonstrate and articulate the value of what they provided. I don't know. That's the Stone theory. Is there any merit to any of that?

Wendy: There is, Stone. About seven years ago, I put together a program that exactly follows what you're saying that. We talk about the Kirkpatrick model in relation to training, but it can apply to anything in life.

When I wake up in the morning as a business owner, and I give myself that one eight minute snooze when I hit the button on the top of my clock/radio, the first thing my mind goes to is, "What is the most important thing I need to accomplish today?" My level four result.

And then I think, "So what specific things do I need to make sure I am doing today to make sure that happens?" That's my level three. And then my level two is, "Do I have all the parts and pieces that I am going to need to be able to accomplish this? Do I need to, you know, look something up and figure it out? Do I need to refer to something? Do I know how to do this?" And then my level one. "Is my environment gonna be correct for this?" And the way that translates in my world is I look at my calendar and I say, "Wow. If I have back-to-back meetings all day, but what I really need to do is get an article written? I need to make a change." So I live these four levels before I really even wake up in the morning.

Lee: So they transcend business. It affects you as an individual.

Wendy: Yeah. You know, the thing that's so fantastic about the model is it is really very simple and intuitive, because it does apply to anything. Now, that doesn't mean that it's easy, because we need to hold ourselves accountable to do it. But it really is that simple. It can apply to anything.

Stone: Now, in the companies you work with, what is the pain that they're having where they're like, "You know what, we should call the Kirkpatrick folks"?

Wendy: You know, the one that makes me the saddest, and this happens every now and then, is someone will call and say something like, "Well. We have a \$2 million leadership development program and we are so proud of it. We put so much into this.

It's three years. All of our high-potential leaders are in it. So, we're in year two now and we think we should start evaluating if it's been effective."

Lee: So after the fact? They decided to evaluate?

Wendy: Yes. So my heart just sinks for them.

Lee: Does that happen a lot? Is that a minority? Or...

Wendy: I would like to think it's happening less, because we're sending this message that evaluation doesn't come at the end, but sadly, yeah, sadly, there are some models that are out there that say, "You know, you develop the training. You deliver it. And then you evaluate what happened." You know, what we like to say is, "Create a plan including what you're trying to accomplish and how you're gonna know if you're on the way and instead of measuring what happened, influence what does happen, because then you're gonna have some results at the end."

Lee: So build in some checkpoints to make sure you're at least on the right path to get where you wanna go, instead of waiting until you've landed somewhere and hope you are in the right place.

Wendy: Exactly. And some of the most successful initiatives we've seen actually started with some noncompliance or some trouble that they weren't even expecting. But the reality is what you just said, Lee. They had those checkpoints, so very shortly after their big event, they realized, "Oh my gosh. People are not truly doing this. Or they're not doing it as much as we were hoping or as well as we were hoping." So they can quickly do some remediation. Get back on track.

Lee: Right, so course correction to get back on track.

Wendy: Absolutely.

Lee: So you've seen some things that have a one to two year plan and they don't check until they're done? Is that true? That's not true.

Wendy: I... you sound incredulous, but it happens all the time.

Lee: It's like, "Oh, I'm gonna go to college every day and then I think I'm gonna be you know, an accountant." At the end, you know, I have a degree in Women's Studies. I'm like, "How'd that happen?"

Stone: That's how this whole conversation started, right? You asked me about this office space?

Wendy: And it does happen. You know, just think back maybe to the last time you attended training. Did anything happen afterwards?

Lee: Stone's in charge of training.

Stone: Not anymore, I'm not. I'm calling the Kirkpatricks in. Speaking of which, the work itself. You and your team, you consult. You speak. You train, but is that true? You do all those things?

Wendy: That is true.

Lee: And she writes. She blogs and she does lots of things.

Stone: And she goes on radio shows and all that stuff. And... but you're really committed to this idea of capability transfer, empowering the organization. And so you have this whole certification process around these disciplines as well, yes?

Wendy: Yes, we do. And this is really something that, if anybody's listening, "Boy, I just don't know if I can pull this off," the first step is the bronze level certification, which is either kicking off with a two day program or five online sessions.

And we walk our own talk. You do pre-work, part of which is talking to your supervisor about what you want to accomplish from this training. And what we like about the program is during the program, you actually take a real program of your own and build the plan. So this plan where we talk about what's going to happen before, during, and particularly after the training. What are you trying to accomplish? What's your highest level result? You build that during the program and to get certified, you submit the plan and we review it and we review every single one and give it written comments and a letter grade.

And you know, if we say, "Hey, we don't see a strong enough plan here," people then basically work on it and resubmit it. So you walk away from the program with a plan that you are ready to execute.

Lee: It's not hypothetical. This is a real, actionable thing that could impact your business upon completion.

Wendy: That's right. Jim Kirkpatrick says all the time that I'm level four and he's level three in our real life. That no way was I gonna be part of a program where there's not a tangible result at the end.

Stone: 'Cause a lot of this is for our sake, right?

Wendy: Right.

Lee: And you're trying to kinda put an end to that, so everything is practical and productive and it's making impact.

Wendy: Yeah, we've seen ourselves the power of training that actually works and the training industry is at some risk of being replaced by things like... think about all the times where you go watch a YouTube video.

Lee: Right.

Wendy: Or just go grab some instructions for how to do something on Pinterest?

Lee: Watch some TED Talks.

Wendy: Yeah.

Lee: That's our training program.

Wendy: And sadly, for a lot of organizations, that's what is happening, because they don't see the value in having a training professional because they're not doing these things.

Lee: Right, but you're uniquely qualified to speak to this, because you were on the other side of the desk.

Wendy: Mmhmm. I was a person that thought I didn't need that training professional.

Lee: Right, so that's not a hypothetical for you. You've lived that. You've felt how that feels so you can really empathize and understand how to create a solution that works.

Wendy: I like to think so.

Stone: Well the irony of this, if that's the right word, is a TED Talk can be marvelous center of content for a module. It just needs to be wrapped in these disciplines. Then it can be extremely effective training, right?

Wendy: Absolutely. You know, sometimes, we get a little bit criticized when we talk about training, 'cause people say, "Oh that's just Stone Age steps because," oh, no pun intended, but, they say, "Well, that just not what people do anymore. You do just go grab TED Talks or a YouTube video." That's fine. You can put training in quotes.

It's anywhere where you get the knowledge to do what you need to do, and we encourage that. You know, use this informal way that we all just use our digital world to get knowledge but, then to your point, you have to have that plan. Okay, so I'm gonna watch a bunch of videos, but then what am I supposed to do? And what's gonna hold

me accountable to doing that and reward me when I do it or course correct when I don't? And what is the point at the end? What am I trying to get out of it?

Stone: Now on this certification, again, I see advantages for everybody. I see advantages for the execs and the lines of business. I'm gonna feel better about the whole operation if the people I'm entrusting my people to do the training. If they are certified. They're credentialed and they're thinking about this and they're gonna follow these disciplines. And if I'm a training professional inside an organization, I gotta believe that's better for me. I have more... my stock's gotta be higher inside the company if I'm... what do you call it, Kirkpatrick certified or is it...?

Wendy: Right.

Stone: If I'm Kirkpatrick certified. And then, back to being an individual practitioner after as a strategy consultant or whatever. To me, I would think this would give me an almost unfair competitive advantage. If you're talking to me and maybe one or two other potential strategy consultants that you might engage, I'm gonna make it known somewhere in the course of that conversation, I'm Kirkpatrick certified. That we're serious about delivering the results. Sorry, I'm probably not telling you anything you don't know, but I suspect that's why people flock to these certifications, right?

Wendy: Well, thank you for your kind words on that. We have been really excited over the last couple of years that we've seen in job descriptions that they are now requiring Kirkpatrick certification for certain training positions for that very reason that they think, "If we're going to invest in somebody who is a training manager, or a director, they need to have this mindset that the training absolutely must increase perform--"

Stone: Yeah, are you Kirkpatrick certified? That's the question to ask now.

Lee: There you go. So if somebody, if a company is having challenges in their training or they're not satisfied with the results or maybe reached a plateau in their training results, what's the best way to get ahold of you guys?

Wendy: Well, we really encourage people to reach out to us. We love to talk to training professionals and help them. Our website is kirkpatrickpartners.com. And if you complete the free, quick registration... we actually just counted the other week. We have over 100 free resources on our website, so if people just wanna read a white paper or watch a recorded webinar, you know, find out a little more about us, that is right there for them. And reach out to us, too. Our number is 770-302-3500. If you wanna set up a time to chat with us, get pointed in the right direction. We just, honestly, we hear all the time from training professionals whose jobs are being eliminated, and we just don't wanna see that.

Lee: And is there one of your books that you would recommend as a first read to kind of familiarize yourself with the process?

Wendy: Yeah. A good one is our newest book, The Kirkpatrick's Four-Level Training Evaluation. We were super excited. It hit number one in the business training books on Amazon when it came out last fall and Jim and I kind of joked, "We put a little too much into this book." This book can really tell you how to do this and how to get started. So, fantastic first step or investment for someone who's serious about really making their training work and frankly, keeping their job.