

Was there success in life? Blending to create usable and effective models

by Beth McGoldrick

Tales from the Field, a monthly column, consists of reports of evidence-based performance improvement practice and advice, presented by graduate students, alumni, and faculty of Boise State University's Instructional and Performance Technology department.

The Need for a Training Program

Our company is a major financial services firm in the United States. Due to a training void caused by decentralized advisor training, compounded by a lack of qualified trainers, new and inexperienced advisors did not know when to use life and disability insurance products with clients or how to choose the most suitable products. A training program "Success in Life Wholesaler Training" was instigated to repair this concern.

In 2008, we instituted a baseline curriculum requiring field delivery and a time commitment of six months. The program consisted of five modules covering life insurance, and a sixth for disability insurance. Wholesalers (with buy-in from field leaders) conducted the field delivery, teaching and coaching four or more offices one module per month, ultimately teaching all six modules in all offices. The audience was either new advisors (less than two-years of industry experience), or low insurance sellers (determined by wholesaler and field leaders).

The Evaluation

For our program we determined value by two factors: increased sales and transforming non-sellers into sellers. Principally the evaluation was to determine if the target audience gained the intended outcomes.

Summative:

- Did insurance sales increase by the Advisors who attended the program, when (a) individually measured against previous year, and (b) compared to peers not having attended training?

Formative:

- What adjustments do we need in the training program, to make it more effective in the future?

The Blend

The program was high profile, affected many departments, and was extremely scrutinized by stakeholders. We determined that one model was insufficient for evaluation, so we blended several strong models to guide our evaluation activities and reinforce our report. To gain immediate responses from the trainees, we used Kirkpatrick's evaluation model (2009). To conduct in-depth analysis, we incorporated Brinkerhoff's Success Case Method (2006). To frame our report, we used Scriven's Key Evaluation Checklist (2007).

The models blended quantitative and qualitative data in order to determine value of the program. In the end we created a robust program evaluation that suited our needs, and those of our stakeholders.

The Results

Reach of Program

72% of all target advisors took at least one module.

Kirkpatrick Level 1

The average score was 4.58 across all six modules (see Table 1); the lowest average was 4.44, the highest average was 4.67. At our company, a score of “4” is very good and a score of “5” is excellent.

Table 1 - Reach and L1

Module	L1 Score	Number rcvd	# who took Module	%
Module 1	4.44	380	817	47%
Module 2	4.52	225	707	32%
Module 3	4.56	149	597	25%
Module 4	4.67	229	516	44%
Module 5	4.66	109	332	33%
Module 6	4.65	67	181	37%
Average/total	4.58	1159	3150	37%

Brinkerhoff/Kirkpatrick Level 3

We observed different levels of success cases (see Table 2). Even though some advisors were identified as low success cases, during the interviews, most advisors stated that the training was helpful and needed. Most advisors provided at least one example of something they are doing differently now because of the training, and are having success with it.

Table 2 - Brinkerhoff/Kirkpatrick L3

	Number	%
High-success cases	32	10%
Low-success cases	12	4%
Possible success cases	40	13%
Indeterminate success cases	36	11%
All others (middle)	200	62%
Total answering survey	320	

During the training and coaching period, trainees submitted 20-25% of all new policy business company-wide, which was a substantial improvement from their performance prior to the training and coaching period. However, after the coaching period was over, trainees' sales returned to the pre-training and coaching levels (8-17%). We attributed this decline in their performance partially to a lack of continuous support through coaching and feedback. It is also supported by Brinkerhoff's theory that 50% of program success is from post-training coaching and feedback. We used these numbers to reinforce with leaders that trainees needed continued coaching after training.

Kirkpatrick Level 4

We used Jim Kirkpatrick's definition of Level 4 – Return on Expectations (2009). Due to economic collapse, success was seen as any increase in sales, considering our competitors were 30-50% below last year's comparables. We had success; most attendees increased sales, even by a point. Another sign of success was delivered when the company's CEO stated "during the economic downturn we gained position entering the top 10 in our four core areas and in some of our insurance products we actually doubled our market share, and we were the only company in our industry that wasn't downgraded by the rating agencies like Moody's." It was a success the leaders can see and communicate.

The Positive Impact

At the onset of our program, the economy changed (industries collapsed, our company restructured leading to smaller sales force, target audience, and number of field leaders), which changed the landscape. So, after we began interpreting the results, we were looking for Brinkerhoff's "positive impact." The material was well delivered, well-received, and applied. The majority of advisors interviewed considered something of the program helped them drive sales, and trainees thought follow-up coaching would help keep the momentum of sales growing. And our blend of methods helped deliver the results to our business stakeholders.

References

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Author bio

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