Case Study

Dustin Sabo

Department of Visual Communications and Technology Education, Bowling Green State University

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Gary M Benjamin, Ph.D.

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Influencing Factors Contributing to Program Success

In the case study *Measuring ROI in a Sales Program: An E-Learning Solution* we are presented with a wealth of information in how to best implement a training program that will be utilized by employees in various locations around the world and in a way that meets the high demands of key stakeholders. The Technology Learning Competency (TLC) Program was designed to determine the current skill levels of sales engineers in order to help them increase their sales skills with the ultimate goal of increasing client partnerships, product sales and contracts, and corporate profits. In this case study, there were many influencing factors that contributed to the success of the TLC program, including:

- The sales engineers who participated in the program
- The sales managers, director, and executive vice president who participated in the program and its development
- Additional program team members, such as subject matter experts (SMEs), consultants, and corporate professionals
- The executive management team

First, there was a great amount of buy-in from the sales engineers. These were the participants who went through the TLC program and understood the value of the program. They devoted time to the program outside of their normal work hours and were engaged in the various modules. They realized that the program was designed to increase their sales performance and made sure to implement what they had learned during the training.

Second, the sales managers, director, and executive vice president of the United Petroleum International (UPI) who also participated in the program were an influencing factor that contributed to the success of the TLC program. Without their time to analyze the need for

the program, conduct coaching sessions with the sales engineers to ensure they had an

implementation plan to follow, and validation of skills and gaps to be measured the program

could not have succeeded. Their belief in the program could be seen by those who had to

participate in the program which helped them to understand its importance.

Third, the subject matter experts (SMEs), consultants, and corporate professionals

influenced the success of the program. SMEs provided feedback about the modules being

created each step of the way to ensure that the content developed would align to the goals of the

program, that the content was accurate, and that the content would be understood by participants.

The consultants and corporate professionals understood the importance of the deadlines that

needed to be met and were able and willing to provide reliable data to back up claims in a timely

manner.

Finally, the executive management team influenced the success of the program by

providing funding for the program but by also being actively invested in the development and

implementation of the program. They realized that this program could lead to great success for

all involved and their involvement, much like the sales managers, showed others below them the

importance of the program.

Conveying Benefits of a Control Group

When working with a management team it is important to convey your knowledge of the

HDR process while also being sensitive to their needs and concerns. Relationship building is

key to a successful program and the potential of future programs. In order to convince

management that a control group arrangement would be beneficial I would first take the time to

get to know them and the company culture, allow them to get to know me and my credentials,

and then build on the relationship by having face-to-face meetings where I could better

understand their goals of the program. This first step, while seemingly unrelated to the program, will pay off dividends as we continue through the program.

As part of these meetings, I would utilize any information the management team provides related to wanting to ensure accuracy, credibility, and repeatable results. These areas would help me to better explain to them why a control group arrangement would be beneficial. If I can help them to express their own desire for accuracy, I can have a better chance at convincing them that a control group will allow for more accurate and credible results.

Additionally, when meeting with management, I would be sure to convey that without a control group, we would not be able to say with a high confidence level that any improvements (or potential declines) are the result of the program itself. It would be my goal to explain to the management team that the additional time and effort that may go into a control group will actually be worth it because it will allow us to better compare end results of those who were a part of the program versus those who were not a part of the program. If the management team was still not convinced that a control group would be beneficial, and I was confident that the program would help to increase productivity, profits, etc. I might offer a guarantee, potentially in the form of a free training if the results of those in the program were not better than the control group who was not a part of the program. This incentive may be a final factor that would convince them of my confidence in not only the program itself, but the need for a control group.

Recommendations in Converting Customer Satisfaction Improvements to a Monetary Value

As part of the TLC program's reporting, the results from quarterly customer satisfaction surveys were compared to see if there were any differences in customer satisfaction before and after the sales engineers engaged in the training program. Because no standard monetary value existed for an increase or decrease in customer satisfaction this was considered an intangible

benefit and was not converted to a monetary value. However, had additional time been available

for the assessment of surveys and calculation of results this could have been a possibility.

With this additional time, I would have recommended surveying the customers before

and after the TLC program to calculate a base on the amount of product they intended to

purchase in the coming year. After the program was conducted and the sales engineers had

sufficient time to put into practice their newly learned skills, I would have re-surveyed the

customers to see if their sales engineer's new attitude and way of conducting business had an

impact on the amount of product they intended to purchase. Any increases could be attributed to

the program (after ruling out any new product or industry changes that may affect sales).

Additionally, if additional time was provided, I would have recommended analyzing the

sales figures of the prior six to twelve months before the training was conducted. These actual

figures would allow for the comparison of real sales figures after the TLC program (utilizing the

same six to twelve-month timeframe). Just like with the survey, any increase in sales (removing

any effects of new products or industry changes) as compared to the actual figures before the

program could be attributed to the program and increase in customer satisfaction.

Establishing Credibility in Estimates

As part of this evaluation, many estimates were utilized, including isolating how program

effects, new incentive plans, market changes, etc. influenced sales, subject matter expert

compensation, and the effects of the program on sales (ROI calculation). Overall, the estimates

utilized in this evaluation tended to utilize the more conservative estimates which leads to their

higher credibility.

For example, sales engineers and managers were surveyed to provide estimates in

collecting level 4 and level 5 data (changes in business impact and cost benefit comparisons).

Because managers work so closely with sales engineers, it was determined that their estimates could be considered highly credible in determining how each factor (new incentive plan, TLC program, etc.) played a key into the overall increases in sales and profits. When there were differences between sales engineers and managers as to how influential a factor was in the increased sales, the lower estimate was always used so as to establish credibility. By always erroring on the said of caution, the results are more likely to be replicable across multiple programs and thus more credible.

Determining Overall Credibility of the Study

Ultimately, the goal of reporting your findings is to reaffirm the need for the program, establish the goals were met, and prove its credibility. This study, analyzing the effects of a training program for UPI seems to be highly credible for many reasons.

First, the program creators were careful to integrate stakeholders from the start. By ensuring their buy-in and that their concerns are heard they are establishing that they are not aiming to push a certain agenda and are looking out for their customer's needs first and foremost. Second, the program creators made sure to utilize outside sources when necessary, in the form of consultants and subject matter experts. By utilizing these external partners, they were ensuring that those with the most knowledge in the areas where knowledge may have been lacking were available to guide the design, implementation, and assessment.

Additionally, the program creators had an open line of communication during the entire project and were willing to work with the company in meeting the tight deadline and goals of the project. Again, showing their willingness to work with the company proves they have their best interests at heart. Finally, because the estimates used tended to error on the side of being conservative, the program results, when reported to the stakeholders, were able to give credit

where credit was due and not imply improvements that were not present or able to be replicated

in a future program.

References

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